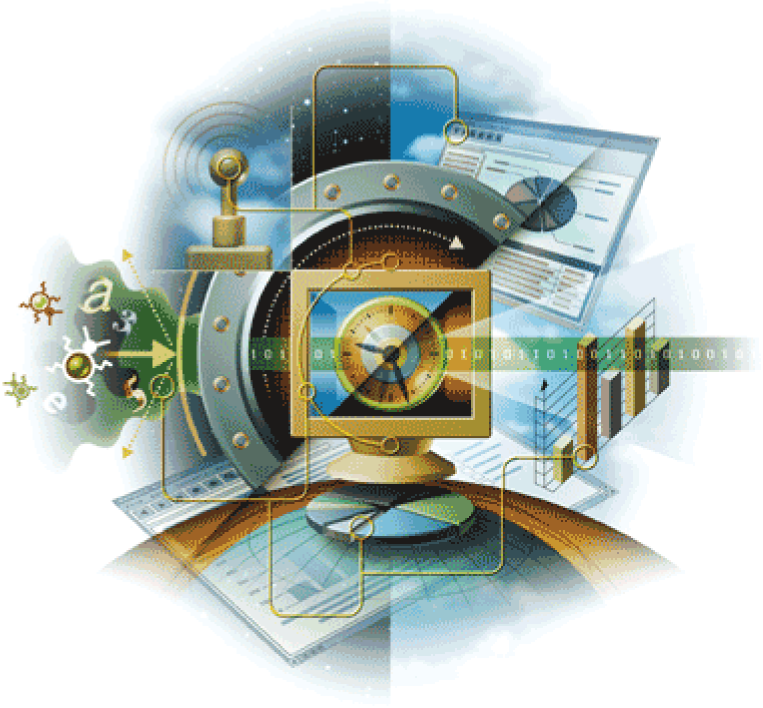
User Guide

revision 1.0

McAfee® GroupShield™

version 7.0

For Microsoft® Exchange



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1 Introduction

About GroupShield for Exchange

This section introduces McAfee® GroupShield™ 7.0 and describes how it protects your Microsoft® Exchange Server 2003 and Microsoft® Exchange Server 2007 from potentially harmful, unwanted, and undesirable content.

Topics covered are:

- *What is GroupShield?*
- *How does GroupShield work?*
- *How GroupShield protects Exchange?*
- *Where GroupShield sits on your network?*
- *Other areas to protect*
- *GroupShield Features*
  - *What is New?*
  - *Features not supported*

What is GroupShield?

McAfee® GroupShield™ 7.0 software protects Microsoft® Exchange Server 2003 and Microsoft® Exchange Server 2007 from virus, phish, spam, unwanted content, potentially unwanted programs, and banned file types/messages. It also supports content filtering within the email messages.

How does GroupShield work?

The GroupShield software integrates with Microsoft® Exchange Server 2003/2007 to scan email messages for detections.

Each time, an email message is sent to or received from a source, GroupShield scans it comparing it with a list of known viruses and suspected virus-like behavior. GroupShield can also scan for content within the email message using rules and policies defined within the GroupShield software.

How GroupShield protects Exchange?

GroupShield uses McAfee® Transport Scanner and Microsoft® Virus Scanning API (VSAPI) to scan all email messages.

For Microsoft® Exchange Server 2003 (used as a Bridgehead Server) and Microsoft® Exchange Server 2007 (with Edge Transport or Hub Transport-only role), GroupShield uses McAfee® Transport Scanner (and not Microsoft® Transport Scanner) to protect the server. However, for Exchange Server 2003 Mailbox Server and Exchange 2007 MailBox Role, GroupShield provides additional scanning option using Microsoft VSAPI.

The anti-spam, anti-virus, and the content management engine scan the messages and provide the result to GroupShield 7.0 before being written to the file system or being read by the Microsoft® Exchange 2003/2007 users.

The anti-virus scanning engine and the anti-spam scanning engine compare the email message with all the known signatures stored within the currently installed virus definition (DAT) files and anti-spam rules. The anti-virus engine also checks the message using the selected heuristic detection methods.

The content management engine searches the email message for banned content as specified in the content management policies running within the GroupShield software.

If there are no viruses, banned/unwanted content in the email message, GroupShield passes the information back to Microsoft® Exchange 2003/2007.

In case of a detection, GroupShield takes actions that are defined within its configuration settings.

The default actions may differ, depending on the installed version of Microsoft® Exchange and, where applicable, the chosen scanning method.

Email server protection — McAfee GroupShield

McAfee GroupShield 7.0 integrates with Microsoft® Exchange Server 2003/2007 to protect against viruses that may be transmitted using your corporate email system.

Due to the close integration between your email server and GroupShield anti-virus solution, GroupShield can do more than just protecting your email server from viruses. It can:

- protect the email server from harmful scripts sent within the email system.
- block messages with specific attachments.
- block messages based on words that appear either within the subject line/body of the message.
- block messages from specific addresses.

How does scanning work?

Central to your GroupShield software is the McAfee® Security scanning engine and the virus definition (DAT) files. The engine is a complex data analyzer. The DAT files contain a great deal of information including thousands of different drivers, each of which contains detailed instructions on how to identify a virus or a type of virus.

The McAfee® Security scanning engine works with the DAT files. It identifies the type of the item being scanned and decodes the contents of that object, so that it understands what the item is. It then uses the information in the DAT files to search and locate known viruses. Many viruses have a distinctive signature. There is a sequence of characters unique to a virus and the engine searches for that signature.

The engine uses a technique called heuristic analysis to search for unknown viruses. This involves analysis of the object's program code and searching for distinctive features typically found in viruses.

Once the engine has confirmed the identity of a virus, it cleans the object as far as possible. For example, by removing an infected macro from the attachment in which it is found or by deleting the virus code in an executable file. In some instances, if the virus has destroyed data, the file cannot be fixed and the engine must make the file safe so that it cannot be activated and infect other files.

Other areas to protect

The following key areas of your network can be protected by McAfee® Security products as a part of your integrated virus defense solution:

- **Internet gateway protection — Secure Content Management Appliances**

  The major source of threats to your corporate network comes from Internet traffic, either through email or by connecting to websites that might contain potentially harmful code. Secure Content Management Appliances protects the gateway between your internal networks and the Internet. It prevents infected items from entering your network through the Internet by scanning all inbound and outbound traffic between your network and the Internet.

- **Document repository protection — McAfee PortalShield**

  Using computers within corporate environment has made it easy to create documents that might contain mission-critical information. Several software vendors produce portal servers to store, index and control your critical documents in a way that enables them to be easily located when needed. Because these portal servers are set up to store your critical information, it is important that this information is also protected. McAfee® PortalShield™ integrates with the stores of these products to provide scanning of such documents each time they are accessed from, or saved to the store.

- **Desktop and file server protection — McAfee VirusScan Enterprise**

  Not all viruses are transmitted via email. Many can be spread by reading from physical media, such as diskettes or CDs. Others can spread by using network shares to copy themselves from one computer to another across your network.

  From the viewpoint of somebody trying to attack your corporate network, your file servers are a good target because many other computers connect to the file servers. Infecting the file server is more likely to have serious consequences than infecting a single desktop computer.

  The McAfee® VirusScan products protect desktop computers and file servers within your network. As part of your integrated response to virus threats, VirusScan can be viewed as your last line of defense, protecting each desktop computer and file server from viruses that might spread using network shares or physical media.

  VirusScan is available in versions to protect Microsoft® Windows, Unix, Apple Macintosh computers, as well as all the leading wireless devices that might connect to your PCs and network.

- **Management solution — McAfee® ePolicy Orchestrator**

  With ePolicy Orchestrator, you can manage and update all your McAfee anti-virus solutions across your network from a single point, ensuring that the engines and the virus definition (DAT) files are up-to-date and that the suitable policies are in place to deal with any attacks to your network.

GroupShield Features

GroupShield includes these major features on Exchange Server 2003 and 2007:

- *Anti-virus scanning* — GroupShield provides the ability to scan for viruses contained in email messages that are transmitted over Microsoft® Exchange SMTP or held within the Microsoft® Exchange Server store.
- *Anti-spam scanning* — Spam is increasingly becoming an issue within the workplace. Spam consumes system resources by taking up bandwidth and storage within your corporate systems and distracts staff from their key job functions because they have to deal with the unwanted email within their mailboxes. GroupShield helps you save bandwidth and the storage required by your Microsoft® Exchange servers by assigning spam scores to each email messages while scanning them and by taking the configured action on those messages.
- *Anti-phishing* — GroupShield is capable of detecting email messages containing phish that fraudulently tries to obtain personal information. Typically such email messages request the recipients to click on a link in the email to verify or update contact details, credit card details or other personal information.
- *Content filtering* — GroupShield provides the ability to scan for content/text in an:
  - email message subject line
  - email message body
  - email attachment
- *File filtering* — GroupShield scans an email attachment depending on the file name, file type, and the file size of that attachment.
- *Enterprise rollout, administration, updating and reporting using McAfee® ePolicy Orchestrator and McAfee® ProtectionPilot* — GroupShield integrates with McAfee® ePolicy Orchestrator and McAfee® ProtectionPilot to provide a centralized method for rolling out, administering and updating the GroupShield software across your Microsoft® Exchange system. The ability to centrally manage an organization-wide implementation of the GroupShield software reduces the time required to administer and update the system.

What is New?

- *New Web Based User Interface* — GroupShield for Exchange provides a user friendly web-based interface based on DHTML. To access this, click **Start** | **Programs** | **McAfee** | **GroupShield for Exchange** | **GroupShield for Exchange (Web)**.

- *Policy Management* — The **Policy Manager** menu option lists different policies that you can set up/manage in GroupShield. You can specify various policies/actions that determine how different types of threats are treated when detected. For detailed information on the policy management, refer to the chapter *Policy Manager on page 105*.

- *Anti-Phishing Capability* — GroupShield for Exchange is capable of detecting email messages containing phish that fraudulently tries to obtain personal information.

- *Capability to detect Packers and Potentially Unwanted Programs* — GroupShield for Exchange is capable of detecting packers that compresses and encrypts the original code of an executable file.
  It also detects Potentially Unwanted Programs that are software programs written by legitimate companies which may alter the security state or the privacy posture of a computer on which they are installed.

- *Enhanced Anti-Spam Capability* — GroupShield for Exchange is capable of detecting spam or unsolicited bulk email messages sent to multiple recipients, who did not ask to receive it. It assigns a "spam score" to every email message. You can then choose to block those messages if they are above a certain score.

- *Enhanced Background Scanning options* — For Exchange Server 2007, GroupShield provides enhanced background scanning options. During this type of scanning, not all the email messages are scanned when accessed. This reduces the workload of the scanner. For more information, refer to the sub topic *For Exchange Server 2007 on page 165*.

- *Centralized Scanner, Filter Rules and Enhanced Alert Settings* — Using Scanners, you can configure the scanner-related settings that a policy can apply when scanning items.
  In File Filtering Rules, you can set up rules that apply to file name, file type, and file size. You can use the alert editor to customize the text of an alert message using the Style, Font, Size, and Token menus.

- *Time based scanning and actions* — GroupShield for Exchange enables scanning emails at convenient times or at regular intervals. You can schedule regular scan operations when the server activities are comparatively low and when they do not interfere with your work.

- Content Scanning and True Type File Filtering of Microsoft® Office 2007 file formats

- *Filter for Password Protected ZIP Files* — For more information about this filter, refer to *Password-protected files on page 140*.
- *Filter for Protected Content (Password protected Microsoft® Office files)* — For more information about this filter, refer to *Protected content on page 137*.
- *Support for N+1 cluster* — For more information, refer to *Single Copy Cluster (SCC, N+1 cluster configuration) on Exchange Server 2003 and 2007 on page 34*.
- *Enhanced MIME Scanning* — MIME (Multipurpose Internet Mail Extensions) is a communications standard that enables the transfer of non-ASCII formats over protocols (like SMTP) that supports only 7-bit ASCII characters. GroupShield enables you to specify how such MIME messages are handled.
- *Buffer Overflow protection using VirusScan Enterprise version 8.5i* — A buffer overflow is an anomalous condition where a process attempts to store data beyond the boundaries of a fixed-length buffer. This results in extra data, overwriting the adjacent memory locations. Enabling Buffer Overflow Protection prevents this condition. GroupShield has the provision of buffer overflow protection. For more information, refer to *Buffer Overflow Protection on page 30*.

  Buffer over flow protection is available only on 32 -bit platforms (and not on 64-bit platforms) with Exchange Server 2003.

- *Enhanced Quarantine Management*
  - *Local Quarantine Management* — Detected Items can be quarantined. You can specify the local database to be used as a repository for quarantining email messages. You can also configure maintenance settings for the local quarantine database.
  - *Quarantining using McAfee Quarantine Manager version 4.1 or 4.1.1* — You can specify McAfee Quarantine Manager in a different server as a repository for quarantining infected email messages. This keeps your Exchange Server safe from viruses.
- Integration with:
  - *McAfee ePolicy Orchestrator version 3.6 and 4.0* — to provide a single point of control for your McAfee anti-virus products, to manage anti-virus policies and view reports of anti-virus events and virus activity in an enterprise environment. For more information, refer to the chapters *Integrating with ePolicy Orchestrator 3.6 on page 47* and *Integrating with ePolicy Orchestrator 4.0 on page 63*.

  - *McAfee ProtectionPilot version 1.5 and above* — to provide security management that simplifies anti-virus management tasks for network administrators who manage up to 500 computers. Management consists of deploying (sending and installing) anti-virus products, configuring product settings, and keeping those products up-to-date. For more information, refer to the chapter *Integrating with ProtectionPilot 1.5 on page 77*.
  - *Anti-virus Engine 5200* — to provide improved and latest detections like Packers and Potentially Unwanted Programs, improved emulator with agile methodology.
- Co-existence with:
  - McAfee VirusScan Enterprise v 8.0 and above.
  - McAfee Host Intrusion Prevention Agent.
- *Auto-update of Virus Definitions (V2API DATs), ExtraDATs, Anti-Virus engine, Spam engine and Spam rules* — McAfee Security regularly provides updated Virus Definition (DAT) files and virus-scanning engine, spam engine and rules to detect and clean the latest threats.

GroupShield uses new version of anti-virus DATs and engine (V2API). This provides improved detections of the latest viruses and threats.

- *Product Update using SuperDAT v 2.2 executable* — GroupShield helps you keep your server free from viruses, Trojans, spams, phish, PUPs by regularly updating the product using SuperDAT executable.
- *In-product Reports* — GroupShield generates status reports and graphical reports to view information about the detected items.
- *Anti-Virus Stamping mechanism on a Microsoft® Exchange Server 2007 with Edge or Hub server role* — McAfee® Transport Scanner assigns a stamp to the header of an email message after scanning. This prevents the message from being re-scanned by VSAPI.
- *Direction Based Scanning* — GroupShield supports direction-based scanning. It scans inbound, outbound, and internal email messages using McAfee® Transport Scanner.
- *User and Server level blacklist and whitelist using McAfee Quarantine Manager version 4.1* — For more information, refer to *Upgrading Blacklists and Whitelists on page 42*.
- *Integration with SuperDAT Manager version 2.2* — SuperDAT Manager 2.2 supports updating of the DAT and Engine for the GroupShield software.

- *Integration with McAfee Common Management Agent (CMA) version 3.6 and above* — You can use the CMA component to manage GroupShield and perform product updates, scheduled tasks, and events reporting as a part of the core installation.

Features not supported

- Integration with black and whitelist server application installed along with GroupShield for Exchange version 6.x.
- Integration with Outbreak Manager (OBM).
- Integration with Alert Manager (AM).
- Integration with ProtectionPilot 1.1.
- Integration with ePolicy Orchestrator 3.5.x.
- Integration with Exchange Server 2000.
- Integration with Common Management Agent 3.5.x.
- Integration with McAfee AutoUpdate Architect 1.x.

Using this Guide

This guide describes the sequential process of installing McAfee GroupShield™ 7.0 for Microsoft® Exchange 2003 and 2007. It also gives a detailed description of the software usage. Topics covered are:

- *Pre-Installation* — Pre-installation scenarios and system requirements.
- *Installing the Software* — Accessing and installing GroupShield.
- *Post-Installation Tasks and Maintenance* — Testing the GroupShield installation, anti-virus component, anti-spam component and testing using the McAfee Virtual Technician. Quarantining using McAfee Quarantine Manager, modifying, repairing, restoring and uninstalling the software.
- *Integrating with ePolicy Orchestrator 3.6* — Testing the GroupShield integration with ePolicy Orchestrator version 3.6.
- *Integrating with ePolicy Orchestrator 4.0* — Testing the GroupShield integration with ePolicy Orchestrator version 4.0.
- *Integrating with ProtectionPilot 1.5* — Testing the GroupShield integration with ProtectionPilot.
- *Getting Started with the User Interface* — Using GroupShield for Microsoft® Exchange Server 2003/2007, getting detailed information about the dashboard, detected items, policy manager and settings & diagnostics.

Audience

This information is intended for network administrators who are responsible for their company’s anti-virus and security program.

Conventions

This guide uses the following conventions:

Bold Condensed

All words from the interface, including options, menus, buttons, and dialog box names.

Example:
Type the **User** name and **Password** of the appropriate account.

`Courier`

The path of a folder or program; text that represents something the user types exactly (for example, a command at the system prompt).

Examples:
The default location for the program is:

```
C:\Program Files\McAfee\EPO\3.6.0
```

Run this command on the client computer:

```
scan --help
```

Italic

For emphasis or when introducing a new term; for names of product documentation and topics (headings) within the material.

Example:
Refer to the *VirusScan Enterprise Product Guide* for more information.

Blue

A web address (URL) and/or a live link.

Example:
Visit the McAfee web site at:

`http://www.mcafee.com`

<TERM>

Angle brackets enclose a generic term.

Example:
In the console tree, right-click <SERVER>.

ⓘ **Note:** Supplemental information; for example, another method of executing the same command.

💡 **Tip:** Suggestions for best practices and recommendations from McAfee for threat prevention, performance and efficiency.

❗ **Caution:** Important advice to protect your computer system, enterprise, software installation or data.

⚠ **Warning:** Important advice to protect a user from bodily harm when using a hardware product.

Getting product information

Unless otherwise noted, product documentation comes as Adobe Acrobat .PDF files, available on the product CD or from the McAfee download site.

Standard documentation

User Guide — System requirements and instructions for installing and starting the software. Getting started with the product and its features, detailed instructions for configuring the software, information on deployment, recurring tasks, and operating procedures.

Help — High-level and detailed information accessed from the software application: **Help** menu and/or **Help** button for page-level help; right-click option for *What's This?* help.

Release Notes — *ReadMe.* Product information, resolved issues, any known issues, and last-minute additions or changes to the product or its documentation.

Contact information

Threat Center: McAfee Avert® Labs http://www.mcafee.com/us/threat_center/default.asp

Avert Labs Threat Library
http://vil.nai.com

Avert Labs WebImmune & Submit a Sample *(Logon credentials required)*
https://www.webimmune.net/default.asp

Avert Labs DAT Notification Service
http://vil.nai.com/vil/signup_DAT_notification.aspx

Download Site http://www.mcafee.com/us/downloads/

Product Upgrades *(Valid grant number required)*

Security Updates (DATs, engine)

HotFix and Patch Releases

- **For Security Vulnerabilities** *(Available to the public)*
- **For Products** *(ServicePortal account and valid grant number required)*

Product Evaluation

McAfee Beta Program

Technical Support http://www.mcafee.com/us/support/

KnowledgeBase Search
http://knowledge.mcafee.com/

McAfee Technical Support ServicePortal *(Logon credentials required)*
https://mysupport.mcafee.com/eservice_enu/start.swe

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Small and Medium Business: http://www.mcafee.com/us/smb/services/index.html

2 Pre-Installation

This chapter provides information that is important to consider before installing GroupShield for Exchange 7.0. Topics covered are:

- *Pre-Installation scenarios*
- *System requirements*

Pre-Installation scenarios

You MUST log on to Microsoft® Windows as a domain administrator. This gives you relevant rights and permissions to install GroupShield.

Before installing GroupShield:

- Make sure Microsoft® Exchange Server 2003/2007 is installed on the installation server.
- Manually uninstall GroupShield software older than version 6.0.2.

> GroupShield for Exchange 7.0 supports automatic upgrading of the software from version 6.0.2 and above.

- Uninstall SpamKilller for Exchange using the Windows **Add/Remove Programs** feature.

> GroupShield for Exchange 7.0 does not support upgrading of SpamKiller software.

Types of installation

GroupShield can be installed on Microsoft® Exchange Server 2003/2007 in these ways:

- *Standard installation*
- *Silent installation*
- *Cluster installation*

Standard installation

You can install McAfee® GroupShield software on Microsoft® Exchange Server 2003/2007. Refer to *Installing GroupShield for Microsoft® Exchange Server 2003/2007 on page 26* for step-by-step instructions.

Silent installation

You can install McAfee® GroupShield software on Microsoft® Exchange Server 2003/2007 without user interaction. This is also known as unattended installation. Refer to *Silent installation on page 32* for step-by-step instructions.

Cluster installation

You can install McAfee® GroupShield software on Microsoft® Exchange Server 2003/2007 on a cluster environment. Refer to *Configuring GroupShield in a cluster environment on page 33* for step-by-step instructions.

System requirements

Before you install GroupShield, ensure that your server meets these requirements:

Table 2-1 System Requirements

Processor	■ Intel x64 architecture-based processor that supports Intel Extended Memory 64 Technology (Intel EM64T) ■ AMD x64 architecture-based processor with AMD 64-bit technology ■ Intel x86 architecture-based processor (only on Exchange Server 2003)
Memory	■ Minimum: 512 MB ■ Recommended: 1 GB
Available Hard disk space	■ Minimum: 740MB
Operating system	■ Windows 2000 Advanced Server with Service Pack 4 ■ Windows 2003 Standard/Enterprise Server (32-bit) ■ Windows 2003 Standard/Enterprise Server R2 (32-bit) ■ Windows 2003 Standard/Enterprise Server (64-bit) ■ Windows 2003 Small Business Server (32-bit) ■ Windows 2003 Datacenter Server (32-bit) ■ Windows 2003 Datacenter Server (64-bit) **Note:** Refer Windows service pack requirements Release Notes for Service Pack information.
Exchange Servers Supported	■ Microsoft® Exchange Server 2003 with Service Pack 2 ■ Microsoft® Exchange Server 2007
Browsers Supported	■ Microsoft® Internet Explorer version 6 and above ■ Netscape Navigator version 9.0 ■ Mozilla version 2.0
Screen Resolution	1024 x 768 For the best display, set the color resolution to 24-bit or higher
General	A CD-ROM drive (if installing from a CD) or an Internet connection (if installing from the McAfee download site)

3 Installing the Software

Installing GroupShield software consists of these topics:

- *Accessing the software*
- *What is included with the software?*
- *Installing GroupShield for Microsoft® Exchange Server 2003/2007*
- *Installing additional components*
- *Silent installation*
- *Configuring GroupShield in a cluster environment*
- *Upgrading GroupShield from v6.0.2 or higher*

Accessing the software

McAfee distributes GroupShield for Exchange in two ways:

- As an archived file that you download from the McAfee website or from other electronic services.
- On the Total Virus Defense (TVD), the Active Virus Defense (AVD) or the suite CDs.

Once you have downloaded the archive file or placed the TVD or AVD installation CD in your CD-ROM drive, the installation steps you follow are the same for each type of distribution.

> To install, manage, remove or upgrade GroupShield for Microsoft® Exchange Server 2003/2007, you must have a user account with administrative rights.

What is included with the software?

GroupShield for Exchange has these components in the installer that you can install separately.

- McAfee GroupShield for Exchange 7.0
- Buffer Overflow Protection
- McAfee Anti-Spam for GroupShield

The McAfee GroupShield for Exchange 7.0 option is selected by default. If you want to install the additional software components, you must select them in the installer.

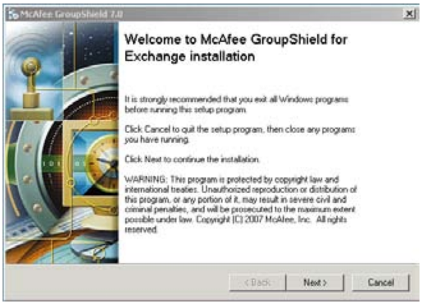
> ! McAfee® GroupShield™ for Microsoft® Exchange Server 2003/2007 does not upgrade McAfee® SpamKiller for Exchange installation. You should uninstall McAfee® SpamKiller for Exchange manually before installing GroupShield for Exchange 7.0.

Installing GroupShield for Microsoft® Exchange Server 2003/2007

1. Using an administrative account, log on to the Microsoft® Exchange Server 2003/2007.
2. Create a temporary directory on the network or your local drive.
3. To install, do one of the following depending on how you obtained the software:
   - Insert the CD into the computers drive and copy the installation files to the temporary directory you created.
   - Download the .ZIP archive and extract the files to the temporary directory.

4 Using Windows Explorer, navigate to the folder where you copied the installation files and double-click **SETUP.EXE**. The **GroupShield for Exchange** setup dialog box appears.

Figure 3-1 McAfee GroupShield for Exchange - Welcome



McAfee GroupShield 7.0

Welcome to McAfee GroupShield for Exchange installation

It is strongly recommended that you exit all Windows programs before running this setup program.

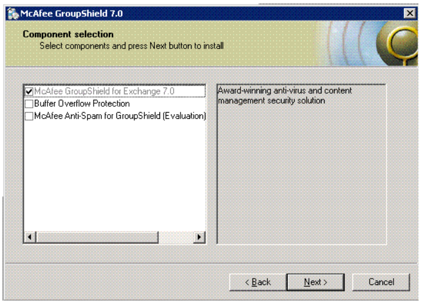
Click Cancel to quit the setup program, then close any programs you have running.

Click Next to continue the installation.

WARNING: This program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law. Copyright (C) 2007 McAfee, Inc. All rights reserved.

5 Click **Next**. The **Component Selection** dialog box displays the software components you can install.

Figure 3-2 McAfee GroupShield for Exchange - Component selection



McAfee GroupShield 7.0

Component selection
Select components and press Next button to install

☑ McAfee GroupShield for Exchange 7.0
□ Buffer Overflow Protection
□ McAfee Anti-Spam for GroupShield (Evaluation)

Award-winning anti-virus and content management security solution

- **McAfee GroupShield for Exchange 7.0** is selected by default.
- **Buffer Overflow Protection** provides buffer overflow protection through host intrusion prevention using McAfee VirusScan Enterprise version 8.5i.

Buffer overflow protection is not supported on 64-bit platforms.

- **McAfee Anti-Spam for GroupShield (Evaluation)** provides filters to block spam and phish emails.

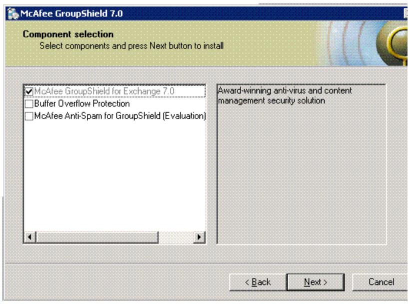
> Anti-Spam and Anti-Phish feature is available only if you install **McAfee Anti-Spam for GroupShield** component during installation. McAfee Anti-Spam for GroupShield requires activation to enable it to work in licensed mode.

6. Select the software components to install and click **Next**.

> When preparing your computer for installation, if the wizard finds any programs running on your computer, an **Installation Wizard** dialog box appears recommending you to exit any programs running, before continuing with installation.

7. When the **End User License Agreement** dialog box appears, select the **License expiry type** and **Select country where purchased and used** from the drop-down menus.
8. Click **I accept the terms in the license agreement**, then **OK** to display the **Destination Folder** dialog box.
9. Click **Browse** to select a different folder or **Next** to install the software in the default directory. The **Select Installation type** dialog box appears.
10. Select the desired installation type from these options:
    - **Typical** - installs the most common application features and is recommended for most users.
    - **Complete** - installs all the application features.
    - **Custom** - installs the application features you want and is recommended for advanced users.

Figure 3-3 McAfee GroupShield for Exchange - Select Installation type



McAfee GroupShield 7.0

Component selection
Select components and press Next button to install

☑ McAfee GroupShield for Exchange 7.0
☐ Buffer Overflow Protection
☐ McAfee Anti-Spam for GroupShield (Evaluation)

Award-winning anti-virus and content management security solution

11. Click **Next**. The **Ready to Install the Application** dialog box appears. Select **Create Desktop Shortcut** to create a shortcut icon on the desktop.

12 Click **Next** to display the **Updating System** dialog box. A progress bar indicates the features being copied and installed. Once the installation process completes, click **Finish** to complete the GroupShield for Exchange installation process.

13 Upon successful completion of the installation, these menus are available from the **Start | Programs | McAfee | GroupShield for Exchange** menu:

- GroupShield for Exchange (Web)
- SiteList Editor
- GroupShield for Exchange
- GroupShield for Exchange Access Control

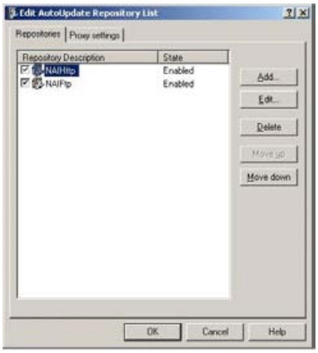
> The **GroupShield for Exchange (Web)** option appears in the menu, only if you choose the **Complete** installation type.

SiteList editor

This is a new functionality in the software, where you can see the list of sites configured for update. The user interface is similar to that of McAfee VirusScan Enterprise.

This application modifies the **sitelist.xml** file of the current machine. **EditSiteList.exe** is the tool used for editing the sitelist.xml file.

Figure 3-4 SiteList Editor



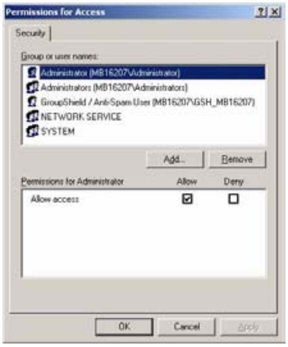
Repository Description	State
☑ NAIHttp	Enabled
☑ NAIFtp	Enabled

GroupShield for Exchange Access Control

Access control is used to restrict user access to the GroupShield software. You can simplify the administration of access control by using one or more administrative user groups and then setting the appropriate permissions to each group. Then simply add individual users to the user group to grant them those permissions.

Permissions can be applied to any object in directory or on the local computer, but majority of permissions should be applied to groups, rather than individual users. This eases the task of managing permissions on the software.

Figure 3-5 Access Control



Group or user names:

- Administrator (MB16207\Administrator)
- Administrators (MB16207\Administrators)
- GroupShield / Anti-Spam User (MB16207\GSH_MB16207)
- NETWORK SERVICE
- SYSTEM

Permissions for Administrator	Allow	Deny
Allow access	☑	☐

Installing additional components

After the wizard completes the installation of GroupShield for Exchange, the installation process continues if you had selected any of these additional components:

- Buffer Overflow Protection
- McAfee Anti-Spam for GroupShield

> The McAfee GroupShield for Exchange 7.0 component is selected by default. If you want to install additional software components, you must select them in the installer. McAfee Anti-Spam for GroupShield component requires a license key for activation.

Buffer Overflow Protection

Buffer overflow is an attack technique that exploits a software design defect in an application or process to force it to execute code on the computer. Applications have fixed-size buffers that hold data. If an attacker sends too much data or code into one of these buffers, the buffer overflows. The computer then executes the code that overflowed as a program. As the code execution occurs in the security content of the application (which is often at a highly-privileged or administrative level), intruders gain access to execute commands not usually accessible to them. An attacker can use this vulnerability to execute custom hacking code on the computer and compromise its security and data integrity.

Buffer overflow protection prevents exploited buffer overflows from executing arbitrary code on your computer. It monitors usermode API calls and recognizes when they are called as a result of buffer overflow.

GroupShield for Exchange uses the buffer overflow protection of VirusScan Enterprise to protect these processes:

- RPCServ.exe
- PrfCtrs.exe
- RunScheduled.exe
- SAFeService.exe
- SDEDIT.exe
- StandaloneUI.exe

Enabling buffer overflow protection:
Using Windows Explorer, navigate to the folder where you copied the installation files and double-click **BOPActivation.EXE**.

For more information on buffer overflow protection, refer to *VirusScan Enterprise v 8.5 User Guide*.

Installing McAfee Anti-Spam for GroupShield

Anti-Spam and Anti-Phish feature is available only if you install McAfee Anti-Spam for GroupShield component during installation. McAfee Anti-Spam for GroupShield requires activation to enable it to work in licensed mode.

1. If you have selected **McAfee Anti-Spam for GroupShield** in the **Component selection** dialog box, the **Add-on Package** dialog box appears.
2. Click **Next**. When the **End User License Agreement** dialog box appears, choose **Select the location where purchased and used** from the drop-down menu.
3. Click **Next** to install the Anti-Spam feature, then click **Finish** to complete the installation.

Silent installation

The GroupShield for Exchange installation is performed by MSI. You can set the properties used by the MSI either by editing the `SILENT.INI` file or by passing the properties directly to the MSI via the command line.

Silent installation allows you to choose the most convenient time to install GroupShield for Exchange on Microsoft® Windows. Another advantage of silent installation is that it requires little involvement compared to a manual installation.

Before installation, please ensure that the Windows Net Logon Service is running on the Windows server using domain controllers.

> You cannot use silent installation to add or remove components or to do a repair.

Installing GroupShield for Exchange in silent mode

1 Using an administrative account, log on to the computer containing Microsoft® Exchange Server 2003/2007.

2 Create a temporary directory on the network or your local drive.

3 To install, do one of the following depending on how you obtained the software:

- Insert the CD into the computer’s drive and copy the installation files into the temporary directory you created.
- Download the .ZIP archive and extract the file to the temporary directory.

4 From the command prompt, change the directory to the temporary folder where you have extracted the installation files.

5 Ensure that the `GROUPSHIELD.MSI` file is located in the temporary folder.

6 Type `MSIEXEC /I <Full Path of the MSI> /QN` and press ENTER.

> Temporary directory = C:\GSE7
>
> `MSIEXEC /I C:\GSE7\GROUPSHIELD.MSI /QN`

7 To install directory to a **Custom** folder and enable installation logs, type:

`MSIEXEC /I <MSI path> INSTALLDIR=<Install Directory>` and press ENTER.

Install folder = C:\GSE7INSTALL

```
MSIEXEC /I C:\GSE7\GROUPSHIELD.MSI INSTALLDIR=C:\GSE7INSTALL /QN
MSIEXEC /I <MSI path> INSTALLDIR=<Install Directory> /l* <log
filename and path>
MSIEXEC /I C:\GSE7\GROUPSHIELD.MSI INSTALLDIR=C:\GSE7INSTALL /l*
C:\GSE7\GSELOG.TXT /QN
```

Upon successful completion of the installation process, these menu appears under **Start | Programs | McAfee | GroupShield for Exchange**

- **GroupShield for Exchange**
- **GroupShield for Exchange Access Control**
- **SiteList Editor**

If silent installation is used, only GroupShield software is installed on the server. To have additional components like Anti-spam for GroupShield, and buffer overflow protection, you should manually execute the respective setup files.

Configuring GroupShield in a cluster environment

This section describes the steps to configure GroupShield in a cluster environment.

GroupShield 7.0 is supported on a *Microsoft® Cluster Service* (MSCS) that is bundled with Microsoft® Windows 2003 in an Active-Passive configuration.You must install GroupShield 7.0 on the same drive and path on all the nodes of the cluster.

GroupShield 7.0 does not support Active-Active cluster configuration. To implement GroupShield in an Active-Active configuration:

- GroupShield 7.0 must be installed on both the nodes of the cluster.
- From the Services MMC, change the Startup type of the GroupShield Exchange service to **Automatic**.
- GroupShield should not be managed using the Cluster Administrator. A resource of type **McAfee Cluster Framework** should not be added in the cluster administrator to any of the cluster groups.
- GroupShield 7.0 should be managed individually on each of the cluster nodes.

Local Continuous Replication (LCR) on Exchange Server 2007

Local Continuous Replication (LCR) is a single-server solution that uses built-in asynchronous log shipping technology to create and maintain a copy of a storage group on a second set of disks that are connected to the same server as the production storage group.

LCR is not a failover implementation. So GroupShield 7.0 can be installed and used in a similar way to that of a standalone mailbox server installation.

Clustered Continuous Replication (CCR) on Exchange Server 2007

Cluster Continuous Replication (CCR) is a high availability feature of Microsoft® Exchange Server 2007. It combines the asynchronous log shipping and replay technology built into Microsoft® Exchange Server 2007 with the failover and management features provided by the Microsoft® Cluster service.

Install GroupShield 7.0 on all the nodes of the cluster following the standard installation steps.

On an Exchange 2007 CCR Cluster, GroupShield for Exchange 7.0 will not be cluster aware application. A resource type for GroupShield for Exchange 7.0 will not be available in the **Cluster Administrator** and cannot be added to the Exchange Virtual Server. GroupShield for Exchange 7.0 on all nodes of the cluster must be configured independently and will work as standalone instances.

Single Copy Cluster (SCC, N+1 cluster configuration) on Exchange Server 2003 and 2007

A *Single Copy Cluster (SCC)* is a clustered mailbox server that uses shared storage in a failover cluster configuration to allow multiple servers to manage a single copy of the storage groups. This is built on the failover and management features provided by the Microsoft® Cluster service. The Exchange Virtual Server uses its own network identity and not the identity of any node in the cluster. This network identity is referred to as a clustered mailbox server.

Both Exchange 2007 Mailbox server and Exchange 2003 can be deployed in this type of cluster.

Install GroupShield 7.0 on all the nodes of the cluster following the steps of standard installation.

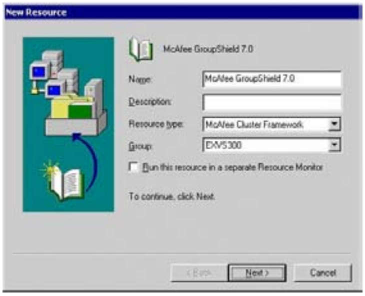
GroupShield for Exchange 7.0 should be added to the Cluster groups where the Exchange virtual server is present after the installation on the nodes of the cluster.

Adding GroupShield for Exchange as a resource to the Cluster group

In **Cluster Administrator**, select the Exchange cluster group to which the GroupShield for Exchange resource needs to be added.

1. From the **File** menu, select **New | Resource**. The **New Resource** wizard appears.

Figure 3-6 New Resource



New Resource

McAfee GroupShield 7.0

Name: McAfee GroupShield 7.0

Description:

Resource type: McAfee Cluster Framework

Group: EXVS300

□ Run this resource in a separate Resource Monitor

To continue, click Next.

2. Type a suitable **Name** and **Description** for the **Resource**.

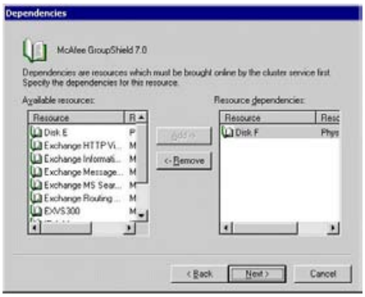
3. From the **Resource type** drop-down list, select **McAfee Cluster Framework**.

4. From the **Group** drop-down list, select the **Cluster group** to which the GroupShield for Exchange resource needs to be added.

5. Click **Next**. The **Possible Owners** screen appears. Ensure that the nodes of the cluster on which GroupShield for Exchange is installed, are listed in the **Possible Owners** list.

6. Click **Next.** The **Dependencies** screen appears.
   Make the current resource of type **McAfee Cluster Framework** dependent on a resource of type **Physical Disk**.

Figure 3-7 Dependencies



Dependencies

McAfee GroupShield 7.0

Dependencies are resources which must be brought online by the cluster service first.
Specify the dependencies for this resource.

Available resources:

Resource	R
Disk E	P
Exchange HTTP Vi...	M
Exchange Informati...	M
Exchange Message...	M
Exchange MS Sear...	M
Exchange Routing ...	M
EXVS300	M

Resource dependencies:

Resource	Reso
Disk F	Phys

7 Click **Next**. The **Parameters** screen appears. In the **Shared Data Drive** section, verify if the disk (selected from the **Dependencies** screen) is displayed.

8 Click **Finish**. A confirmation dialog box appears.

9 Click **OK**. The cluster resource is successfully created.

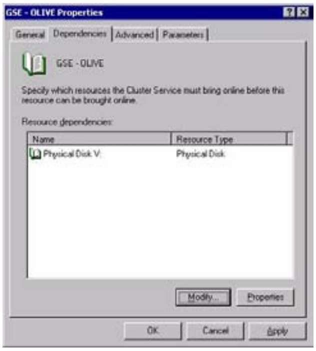
10 In **Cluster Administrator**, right-click on the newly created resource and from the context menu, select **Bring Online** to start the GroupShield for Exchange 7.0 resource.

Repeat the above mentioned steps for every Exchange group on which GroupShield for Exchange is to be added.

For an existing resource of type **McAfee Cluster FrameWork**, the **Physical Disk** resource dependency added at the time of creation should NOT be modified under the **Dependency** tab from the **<McAfee Cluster Framework** resource**> Properties** dialog box.

If the dependency on the physical disk has to be changed, it is recommended to delete the existing resource of type **McAfee Cluster Framework** and then re-create the resource with the required **Physical Disk** dependency.

Figure 3-8 Cluster Dependencies



Specify which resources the Cluster Service must bring online before this resource can be brought online.

Resource dependencies:

Name	Resource Type
Physical Disk V:	Physical Disk

Administration (deployment, configuration and pushing product updates) of GroupShield for Exchange 7.0 on a (n+1) cluster from ePolicy Orchestrator server is not supported.

Product update is specific to a GroupShield for Exchange 7.0 instance in an Exchange Virtual Server. When a product update happens, the node on which the Exchange Virtual Server with GroupShield for Exchange 7.0 is active gets updated. At the time of a failover, the updates are copied to the other node automatically by GroupShield for Exchange 7.0.

Cluster Uninstallation

1 Open the **Cluster Administrator**.

2 Make all the resources of type **McAfee Cluster Framework** offline.

3 Delete all the resources of type **McAfee Cluster Framework**.

4 Close the **Cluster Administrator**.

Make the nodes of the cluster as passive and uninstall GroupShield for Exchange version 7.0 as mentioned in the topic *Uninstalling GroupShield for Exchange on page 45* of this guide. Repeat this on all nodes of the cluster.

> ℹ Uninstalling the software from the cluster does not delete the McAfee folder on the shared drive. You may delete this folder manually after uninstalling the software.

Upgrading GroupShield from v6.0.2 or higher

McAfee® GroupShield for Exchange version 7.0 supports upgrading your configuration settings from the previous version of the product. When upgrading to a new version of GroupShield for Exchange, you do not need to uninstall the existing version. The installation program successfully updates your installation to the new version.

> ℹ Upgrade from McAfee® SpamKiller version 2.1.x is not supported. User should uninstall McAfee® SpamKiller from the **Add/Remove Programs** feature before running GroupShield for Exchange 7.0 installation.

The product upgrades supported are:

- GroupShield for Exchange version 6.0.2
- GroupShield for Exchange version 6.0.2 + Patch1
- GroupShield for Exchange version 6.0.3
- GroupShield for Exchange version 6.0.3 + Patch1

> ℹ Upgrading to GroupShield for Exchange version 7.0 works only on a licensed version of the products mentioned above.

1 Run the setup wrapper of GroupShield for Exchange version 7.0 on GroupShield for Exchange version 6.0.2 / 6.0.2+Patch1 / 6.0.3 / 6.0.3+Patch1 to upgrade to GroupShield for Exchange version 7.0.

2 Select the Add-Ons which you want to install.

3 When the installation is completed successfully, your system is upgraded to GroupShield for Exchange version 7.0.

> After the upgrade, policies, scheduled tasks, rules, and configuration settings are carried forward to GroupShield 7.0

4 Post-Installation Tasks and Maintenance

This chapter includes information that is important to consider when performing post installation and maintenance tasks:

- *Testing your GroupShield installation*
- *Quarantining using McAfee Quarantine Manager*
- *Maintaining your GroupShield application*
- *Uninstalling the GroupShield for Exchange software*

Testing your GroupShield installation

When you have completed installation of GroupShield for Exchange, we recommend that you test the installation to ensure that the software is installed properly and can detect viruses and spam within the email messages.

Testing the anti-virus component

The recommended method to test an anti-virus product is to attach an EICAR anti-virus test file to an email message, and to send the message through the Microsoft® Exchange Server 2003/2007 where you have just installed GroupShield for Exchange.

The EICAR standard anti-virus test file was created jointly by several anti-virus vendors throughout the world to implement a standard by which customers can verify their anti-virus installations.

> This file is not a virus, Ensure that you delete the file when you have finished testing your installation to avoid alarming unsuspecting users.

1 Copy the following line into its own file, then save the file with the name EICAR.COM:

```
X5O!P%@AP[4\PZX54(P^)7CC)7}$EICAR-STANDARD-ANTIVIRUS-TESTFILE!$H+H*
```

The file size will be 68 or 70 bytes.

2 Send an email message through the Exchange Server 2003/2007 with the EICAR test file as an attachment. When GroupShield for Exchange on the Microsoft® Windows examines the email message, it reports finding the EICAR test file but will be unable to clean or repair the EICAR file because it is a test file.

3 GroupShield replaces the EICAR test file with an alert message.

Testing the McAfee Anti-Spam component

You can test the operation of the software by running the GTUBE (General Test mail for Unsolicited Bulk Email) test. The test email message must be sent from an external email account (a different domain).

> You must have McAfee Anti-Spam for GroupShield component installed to test this feature.

1 Create a new Internet (external) email message.

2 In the body of the message, copy the following text:

```
XJS*C4JDBQADN1.NSBN3*2IDNEN*GTUBE-STANDARD-ANTI-UBE-TEST-EMAIL*C.34X
```

Ensure that you enter this with no extra spaces or line breaks.

3 Send the new email message to a mailbox address on the server where you have installed Anti-Spam. Anti-Spam for Exchange scans the message, recognizes it as a junk email message, and deals with it accordingly (as specified in the configuration settings).

> The GTUBE test overrides blacklists and whitelists. For more information on the GTUBE test file, visit:
>
> *http://spamassassin.apache.org/*

Testing GroupShield installation using McAfee Virtual Technician

You can test if GroupShield for Exchange is installed correctly by running McAfee Virtual Technician. McAfee Virtual Technician automatically checks for common deviations that may have occurred since the time you installed the product.

To download McAfee® Virtual Technician, please visit *http://mvt.mcafee.com/mvt/index.asp*

Quarantining using McAfee Quarantine Manager 4.1

McAfee® Quarantine Manager (MQM) can be used as a repository for quarantining infected email messages. McAfee products (like GroupShield for Exchange) uses a pre-assigned port number to send the detection information to MQM.

McAfee® Quarantine Manager in turn uses the same port number by default, to release or send configuration information of the detected email messages to the McAfee product. The communication ports mentioned in GroupShield and in the McAfee® Quarantine Manager user interface should be the same.

You can use McAfee® Quarantine Manager to consolidate the quarantine and anti-spam management functionality. It gives you a central point from which you can analyze and act upon emails and files that have been quarantined. Items are quarantined because they are spam, phish, contain viruses, potentially unwanted software or other undesirable content. McAfee Quarantine Manager is particularly effective in managing unsolicited bulk email or spam.

This guide does not provide detailed information about installing or using McAfee® Quarantine Manager software. See *McAfee Quarantine Manager v 4.1 Product Guide* for more information.

1. Install GroupShield for Exchange on <Server 1>.
2. Install McAfee Quarantine Manager version 4.1 on <Server 2>.
3. Launch GroupShield for Exchange user interface from the <Server 1>.
4. Click **Settings & Diagnostics** | **Detected Items** page.
5. Under **McAfee Quarantine Manager**, select **Enabled**.
6. Type the **IP address** of the <Server 2> server, where you have installed McAfee Quarantine Manager.
7. Use the default values for **Port** and **Callback port** or modify them as configured on McAfee Quarantine Manager Server.

8 Click Apply, to save the changes.

Once you have completed the above setup, GroupShield starts to quarantine detected items on McAfee Quarantine Manager Server; however it also logs them in the local database.

You must install McAfee Quarantine Manager version 4.1 Patch1 and HotFix 285970 on the McAfee Quarantine Manager Server. Installing this Patch and HotFix will enable you to release Quarantined items from the server.

You cannot release quarantined items that are detected as viruses.

To disable quarantining on McAfee Quarantine Manager, go to Settings & Diagnostics | Detected Items page, deselect Enabled, then click Apply. This makes GroupShield to continue quarantining on the local database.

Upgrading Blacklists and Whitelists

The blacklist and whitelist command line upgrade tool can be used to upgrade the user blacklists and whitelists existing in GroupShield version 6.0.x to 7.0. The command line parameters are not case sensitive and you can also use UNC paths when using the upgrade tool.

1 Using an administrative account, log on to the computer containing GroupShield for Exchange version 6.0.x user blacklists and whitelists.

2 Create a temporary directory on your local drive.

3 Download the UserBWListUpgrade.ZIP archive and extract the files to the temporary directory.

4 From the command prompt execute the command shown below:

```
bwl -m <SrcPath> <DestPath> [-d] [value]
```

Parameters:

-m: to upgrade the user blacklists and whitelists.

<SrcPath>: to specify the directory path to the existing GroupShield 6.x user blacklists and whitelists.

<DesPath>: to specify the directory path to where the generated BWLIST.XML file is to be stored. The output XML file generated can be imported into the McAfee Quarantine Manager's database using its Import Export tool.

-d: to enable debugging. The debug log file DEBUG.TXT is generated in the current directory.

[value]: "1" enables debugging, any other value passed to this parameter disables debugging and is FALSE. The default value is set as FALSE.

-h: help

> you can also substitute the parameters:
>
> **- m** with **/m**
>
> **-d** with **/d**
>
> **-h** with **/h**

Syntax examples:

- To upgrade GroupShield 6.x user blacklists and whitelists to version 7.0:

```
bwl -m "c:\GSE_60_BWL_Path\" "c:\GSE_70_BWL_Path"
```

- To upgrade GroupShield 6.x user blacklists and whitelists to version 7.0 with debug logs:

```
bwl -m "c:\GSE_60_BWL_Path\" "c:\GSE_70_BWL_Path" -d 1
```

- To upgrade GroupShield 6.x user blacklists and whitelists to version 7.0 with debug logs using an UNC path:

```
bwl -m "c:"\\server-name\shared-resource-pathname\"
"c:\GSE_70_BWL_Path" -d 1
```

Maintaining your GroupShield application

The GroupShield for Exchange software provides tools to help you maintain your installation. Refer to these topics for detailed instructions:

- *Modifying the GroupShield installation*
- *Repairing the GroupShield installation*
- *Restoring original out-of-box configuration*

Modifying the GroupShield installation

To modify application features installed for GroupShield for Exchange, you can use the Windows **Add/Remove Programs** feature by running the **McAfee GroupShield for Exchange** setup program.

Modifying GroupShield

1 Using administrative account, log on to the computer where Microsoft® Exchange Server 2003/2007 is installed.

2. Ensure that the server and clients are shut down.

3. From the **Start** menu, click **Settings**, then **Control Panel**. The **Control Panel** window appears.

4. Double-click **Add/Remove Programs**. The **Add/Remove Programs** dialog box appears.

5. Select **McAfee GroupShield for Exchange** from the list.

6. Click **Change**. The **Application Maintenance** dialog is displayed.

7. Select **Modify**, then click **Next**.

8. When the **McAfee GroupShield for Exchange** features dialog box appears, modify the required features and click **Next**.
   Once the software is updated, a confirmation message is displayed.

9. Click **Finish** to close the dialog box.

Repairing the GroupShield installation

To repair GroupShield for Exchange, we recommend using the Windows **Add/Remove Programs** feature, although you can also modify GroupShield from the GroupShield for Exchange setup program.

> If GroupShield related files are found to be corrupt or deleted, the repair process will replace them with proper files. However, no configuration settings are changed or modified.

Repairing GroupShield

1. Using administrative account, log on to the computer where Microsoft® Exchange Server 2003/2007 is installed.

2. Ensure that the server and clients are shut down.

3. From the **Start** menu, click **Settings**, then **Control Panel**. The **Control Panel** window appears.

4. Double-click **Add/Remove Programs**. The **Add/Remove Programs** dialog box appears.

5. Select **McAfee GroupShield for Exchange** from the list.

6. Click **Change**. The **Application Maintenance** dialog is displayed.

7. Choose **Repair**, then click **Next**.
   The **McAfee GroupShield for Exchange** features dialog box appears. Once the software is updated, a confirmation message is displayed.

8 Click **Finish** to close the dialog box.

Restoring original out-of-box configuration

To restore default settings and values from the user interface, click **Settings & Diagnostics | Import and Export Configuration | Restore Default**.

ⓘ Alternatively, you can follow the manual steps given below to restore the default settings and values:

1. Stop all Exchange Servers and GroupShield for Exchange services on the host.
2. Copy and replace the McAfeeConfig.XML from <Install_path>\Config\Default\McAfeeConfig.XML
3. Copy and replace cs_rules_en.XML from <Install_path>\Config\Default\<0409>\cs_rules_en.XML <for English language>
4. Start GroupShield for Exchange services on the host.
5. Start Exchange Servers on the host.

Uninstalling GroupShield for Exchange

To remove GroupShield for Exchange, we recommend using the Windows **Add/Remove Programs** feature, although you can also uninstall GroupShield from the GroupShield for Exchange setup program.

Removing GroupShield for Exchange

1. Using administrative account, log on to the computer where Microsoft® Exchange Server 2003/2007 is installed.
2. Ensure that the GroupShield for Exchange services on the server and clients are shut down.
3. From the **Start** menu, click **Settings**, then **Control Panel**. The **Control Panel** window appears.
4. Double-click **Add/Remove Programs**. The **Add/Remove Program Properties** dialog box appears.
5. Select **McAfee GroupShield for Exchange** from the list.
6. Click **Change**. The **Application Maintenance** dialog is displayed.
7. Select **Remove**, then click **Next**.
8. The **McAfee GroupShield for Exchange Uninstall** dialog box appears, click **Next**.

9 Once the software is removed, a message is displayed. Click **Finish** to close the dialog box.

5 Integrating with ePolicy Orchestrator 3.6

Introduction

This chapter describes how to configure GroupShield for Exchange using McAfee ePolicy Orchestrator management software version 3.6. To use this guide effectively, you need to be familiar with ePolicy Orchestrator. See the *ePolicy Orchestrator v3.6 Product Guide* for more information.

The ePolicy Orchestrator software provides a single point of control for your McAfee anti-virus products, to manage anti-virus policies, view reports of anti-virus events and virus activity in an enterprise environment. Using ePolicy Orchestrator, you can configure GroupShield for Exchange on the target computers across your network; you do not need to configure them individually.

This chapter includes how to:

- Check-in the ePolicy Orchestrator agent to the ePolicy Orchestrator repository.
- Check-in the package and NAP files of GroupShield for Exchange to the ePolicy Orchestrator repository.
- Configure ePolicy Orchestrator agent features.
- Set and enforce anti-virus policies on the target systems.

This guide does not provide detailed information about installing or using ePolicy Orchestrator software. See *ePolicy Orchestrator v3.6 Product Guide*.

Pre-requisites for using ePolicy Orchestrator 3.6

Before you can use the ePolicy Orchestrator software to manage GroupShield for Exchange, install the ePolicy Orchestrator agent on the computer.

Introducing ePolicy Orchestrator console

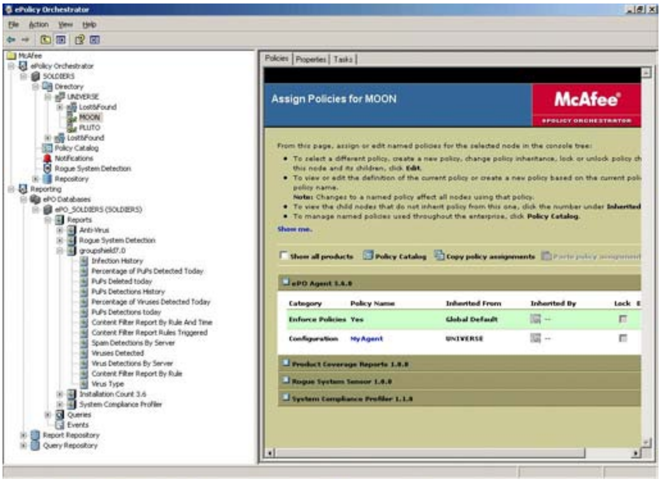
The *Microsoft® Management Console* (MMC) is your interface to the ePolicy Orchestrator product and its features. Here you register and configure the GroupShield for Exchange products that are managed through ePolicy Orchestrator. The console uses standard MMC features.

The console is divided into two panes. When you first log on to the server, the console appears with the Console Root highlighted in the left pane.

- The console tree is the navigation pane of the console. It shows the servers, workstation, and appliances that you can administer using ePolicy Orchestrator.
- The details pane is to the right of the console. Depending on the item selected in the console tree, the details pane might have an upper details pane and lower details pane.

The console's appearance changes to reflect the items you have selected in the console tree or in the details pane.

Figure 5-1 ePolicy Orchestrator Console



Assign Policies for MOON

From this page, assign or edit named policies for the selected node in the console tree:

- To select a different policy, create a new policy, change policy inheritance, lock or unlock policy ch this node and its children, click **Edit**.
- To view or edit the definition of the current policy or create a new policy based on the current poli policy name.
  Note: Changes to a named policy affect all nodes using that policy.
- To view the child nodes that do not inherit policy from this one, click the number under **Inherited**
- To manage named policies used throughout the enterprise, click **Policy Catalog**.

□ Show all products

ePO Agent 3.6.0

Category	Policy Name	Inherited From	Inherited By	Lock
Enforce Policies	Yes	Global Default	--	□
Configuration	MyAgent	UNIVERSE	--	□

Product Coverage Reports 1.0.0

Rogue System Sensor 1.0.0

System Compliance Profiler 1.1.0

The Agent is a distributed component of ePolicy Orchestrator that must be installed on each computer on the network. The agent collects and sends information between the ePolicy Orchestrator server, repositories and manages GroupShield for Exchange installations across the network. How you configure the agent and its policy settings determines how it facilitates communication and updating in your environment.

Assumptions:

- Computer 1: ePolicy Orchestrator version 3.6 is installed and configured on a supported operating system.
- Computer 2: Microsoft® Exchange Server 2003/2007 is installed and configured on the server.
- Exchange Server is added into the ePolicy Orchestrator's managed server list under the "Directory" branch.
- McAfee Common Agent version installed on the ePolicy Orchestrator server should be upgraded from version 3.6.0.444 to 3.6.0.453 or above.
- From ePolicy Orchestrator server console, ePolicy Orchestrator agent is installed or pushed on the Exchange Server.

Before you begin

1. Create a temporary directory on the network or your local drive.
2. To install, do one of the following depending on how you obtained the software:
   - Insert the CD into the computer's drive and copy the installation files into the temporary directory you created.
   - Download the NAP and package .ZIP archive and extract the file to the temporary directory.

> ℹ Anti-Spam and Anti-Phish feature is only available if you install McAfee Anti-Spam for GroupShield component after installation. To install and deploy Anti-Spam and Anti-Phish, you need to check-in the required package into the repository and then deploy. If you have deployed the evaluation package, and want to upgrade to the licensed version, you must check-in the licensed package and then deploy.

Installation

1. Using an administrative account, log on to the ePolicy Orchestrator server. The **ePolicy Orchestrator console** appears.

Creating a new site

2. Right-click **Directory** | **New** | **Site**. The **Add Sites** dialog box appears.

3 Click **Add**. The **New Site** dialog box appears.

> You can create a new site to administer specific group of computers.

4 Type the **Name** for the new site. If the new site is a domain and you want to include all the computers under the domain, select **Domain** and **Include computers as child nodes**.

5 Click **OK** to add the new site. The **Add Site** dialog box appears.

6 Deselect **Send agent package**, then click **OK** to add the new site **<Site name>** to the left pane.

Adding a computer to the site

7 Right-click **Directory** | **<Site name>** | **New** | **Computer**. The **Add Computers** dialog box appears.

8 Click **Browse** to select the computer from the network, then click **OK**. The **Add Computers** dialog box appears.

9 Select **Send agent package**, enter the required **Credentials for Agent Push Installation**, and click **OK** to send the agent to the new computer added.

> If you deselect **Suppress agent installation GUI**, the agent installation user interface will not appear on the client computer during installation.

> To enable ePolicy Orchestrator agent icon in the system tray of the client computer:
>
> a Click **ePO Agent** link on the right pane.
>
> b Click **McAfee Default** link for ePolicy Orchestrator agent, the **ePolicy Orchestrator Agent** page appears.
>
> c Select **Show Agent tray icon**.
>
> d Click **Apply All**.

Sending an Agent Wakeup call

10 From the ePolicy Orchestrator console, right-click the **Site** or the Exchange Server on which you intend to install **GroupShield for Exchange**.

11 Click **Agent Wakeup Call**. The **Agent Wakeup Call** dialog box appears.

12 In the **Agent Wakeup Call** dialog box, change the **Agent randomization** to **0 (zero)** minutes.

13 Select **Get full product properties** and click **OK** to complete the installation.

Adding GroupShield Installation Package files to the ePolicy repository

14 Click **Repository**. The **Repository** page appears.

15 Click **Check in Package**. The **Check in package wizard** appears.

16 Click **Next**. The select package type wizard appears.

17 Select **Products or updates**, then click **Next**. The **Check in package - Browse** dialog box appears.

18 Click **Browse** and navigate to the temporary folder where you have extracted the installation package.

19 Select the **PkgCatalog.z** file, click **Open** and then click **Next**. The **Check in package wizard** displays **Product Name**, **Version**, **Package type** and **Language**.

20 Click **Finish** to check-in the package file.

21 Once the check-in process completes, click **Close**.

Adding GroupShield software NAP file to the repository

1 Click **Repository**. The **Repository** page appears.

2 Click **Check-in NAP**. The **Software Repository Configuration Wizard** appears.

3 Select **Add new software to be managed** and click **Next**. The **Select a software package** dialog box appears.

4 Select the product NAP file from the temporary folder and click **Open**.
The NAP file is extracted and copied to the ePolicy Orchestrator repository. A message dialog box appears upon successful completion.

5 Click **OK**.

Adding GroupShield Reports NAP to the repository

1 Click **Repository**. The **Repository** page appears.

2 Click **Check in NAP**. The **Software Repository Configuration Wizard** appears.

3 Select **Add new reports** and click **Next**. The **Select a software package** dialog box appears.

4 Select the report NAP file from the temporary folder and click **Open**.
The report NAP file is extracted and copied to the ePolicy Orchestrator repository. A message dialog box appears upon successful completion.

5 Click **OK**.

Installing GroupShield on the client computer

1 From the **ePolicy Orchestrator** console, select the **Site** or the Exchange Server on which you intend to install GroupShield, then click the **Tasks** tab. The deployment task page appears.

2 Double-click the **Deployment** task. The **ePolicy Orchestrator Scheduler** dialog box appears.

3 Deselect **Inherit** under the **Tasks** tab and select **Enable (scheduled task runs at specified time)**.

4 Click **Settings** under the **Tasks** tab. The **Task Settings** page appears.

5 Deselect **Inherit**. From the listed products, select **Install** from the list item given against **GroupShield for Exchange**.

6 Deselect **Run this task at every policy enforcement interval**.

7 Click **OK**.

8 Click the **Schedule** tab. Deselect **Inherit**.

9 From the **Schedule Task** list item, select **Run Immediately** and click **Apply**.

10 Click **OK** to complete the deployment task scheduling.

11 Send an agent wakeup call.

> For information on sending an agent wakeup call, refer to *Sending an Agent Wakeup call on page 50*.

Upgrading from GroupShield for Exchange version 6.0.x NAP settings

Assumptions:

- ePolicy Orchestrator version 3.6 is installed on the server.
- NAP files for GroupShield for Exchange version 6.0.2 or version 6.0.3 is checked-in.
- NAP file for GroupShield for Exchange version 7.0 is checked-in.
- You have not created any new policies in the GroupShield for Exchange version 7.0 NAP settings.

Importing the GroupShield for Exchange version 6.x NAP settings

1 Using an administrative account, log on to the computer containing ePolicy Orchestrator Server.

2 Create a temporary directory on the network or your local drive.

3 To install, do one of the following depending on how you obtained the software:

- Insert the CD into the computer's drive and copy the installation files into the temporary directory you created.
- Download the ePOGSENPUpgrade.ZIP archive and extract the file to the temporary directory.

4 Using Windows Explorer, navigate to the folder where you copied the installation files and double-click EPOGSEUPGRADE.EXE.

> This tool exports only the configurations saved under the GroupShield for Exchange version 6.0.2 or version 6.0.3 NAP file to GroupShield for Exchange 7.0 NAP. You can continue to manage all the versions of GroupShield (6.0.x and 7.0) from the ePolicy Orchestrator server.

5 Upon the successful upgrade, the installer prompts a message EPOUpgrade from GSE6.0 to GSE7.0 is completed Successfully.... Please follow the on-screen instructions, if upgrading fails.

> Errors or Exceptions during the upgrade are logged in the file EPODEBUGTRACE.TXT.

Configuring GroupShield Policies

This section explains how you enforce policies from ePolicy Orchestrator. There are two main steps:

1 Within ePolicy Orchestrator, you select the names of the target computer or the site on the network and the policies that will apply to those selected computers.

2 You can enforce all the policies to the Exchange Server using the ePolicy Orchestrator agent. Each computer then observes your new policy, ignoring any polices that were previously configured at GroupShield for Exchange.

Managing Policies

The ePolicy Orchestrator console allows you to manage policies across groups of computers or on a single computer. These policies override configurations set on individual computers. For information regarding policies and how they are enforced, see the *ePolicy Orchestrator Product Guide*.

Before configuring any policies, select the group of computers for which you want to modify GroupShield policies. You can modify GroupShield policies from the pages and tabs that are available in the details pane of the ePolicy Orchestrator console. These pages are identical to those you can access directly from the GroupShield user interface.

After you have modified the appropriate polices and saved the changes for the intended computer or group of computers, you are ready to deploy the new settings via the ePolicy Orchestrator agent.

Modifying policies for GroupShield in ePolicy Orchestrator

1. Using an administrative account, log on to the computer containing ePolicy Orchestrator Server.
2. In the console tree under **ePolicy Orchestrator | <SERVER> | Directory**, select the site, group, single computer or the entire directory to which these policies are to apply.
3. The **Policies**, **Properties**, and **Tasks** tabs appear in the details pane.
4. In the **Policies** tab, under **GroupShield for Exchange**, click **McAfee Default** for a **Category** to view the default policy settings. The Policy Settings dialog box appears.
5. Click **Duplicate** to create and save a copy of the policy settings. The **Duplicate Policy** dialog box appears.
6. Choose to **Duplicate the curent policy** or **Create a policy in which all tabs inherit** as required.
7. Enter a **New policy name**.
8. Select or deselect **Assign this new policy to the current node (breaks inheritance)** as desired, then click **OK**.

Creating a New policy for a Category

1. Click **Edit** for a **Category** in the **GroupShield for Exchange** entry in the ePolicy Orchestrator details pane.

2 Click the **Policy Name** drop-down list and select **New Policy**. The **Create a new policy** dialog box appears.

> You cannot configure the **McAfee Default** policy settings for a selected **Category**. To configure a selected category, you must create a new policy or a duplicate copy of the policy for the selected **Category**.

Table 5-1 Policy Options

New Policy name	Type the new policy name for the Category you want to create.
Duplicate the following policy	Creates a duplicate policy for the selected Category. Select the policy from the drop-down list.
Create a policy in which all tabs inherit	Creates a new policy in which all the policy tab settings are inherited.

3 Configure the required options from the original policy, then click **OK** to create the new policy.

4 Click **Apply** to save these settings.

Editing an existing policy (Non-default)

1 Click for the selected **Category** in the **GroupShield for Exchange** entry in **ePolicy Orchestrator** details pane.

2 Configured the required options, then click **Apply** to save the policy.

> To stop a policy enforcement, click **Edit** for **Enforce Policies** in the **GroupShield for Exchange** entry in ePolicy Orchestrator and select **(No)** from the **Policy Name** drop-down.

Scheduling tasks

When GroupShield scans for viruses, spam or phish, it uses information in the DAT and Rule files to find them. Many new threats are discovered daily and McAfee regularly creates new DAT files to provide protection from these viruses. To ensure the best protection, you can use ePolicy Orchestrator to inform where to access the latest update files and create schedules for replacing earlier DAT and Rule files and running on-demand scans.

Using ePolicy Orchestrator 3.6, you can create these types of scheduled tasks for the GroupShield for Exchange software:

- AutoUpdate

- On-Demand scan

Scheduled tasks for a computer can be set to execute based on the local time or GMT (Greenwich Mean Time). However, ePolicy Orchestrator cannot monitor the progress of a scheduled task. So we recommend you to view the log file in the server periodically to check if the scheduled task was executed successfully.

AutoUpdate task

GroupShield 7.0 software can only provide full protection if you keep it up-to-date with the latest anti-virus definitions (DATs), anti-spam rules, spam engine, and virus-scanning engine. We recommend that you update DAT files daily and regularly check the McAfee AVERT (Anti-Virus Emergency Response Team) website for new DAT files. If you have multiple servers in the current domain, you can use one server to download the latest DAT files, then configure the others to copy the files from that server. Your servers can download files for a number of operating systems, regardless of the operating systems that are in use.

Creating an AutoUpdate task

1. Using an administrative account, log on to the computer containing ePolicy Orchestrator Server.

2. In the console tree under **ePolicy Orchestrator**, right-click **Directory** or the site, group or host, then select **Schedule Task**.
   Alternatively, you click the **Tasks** tab in the upper details pane. Right-click in the pane, and select **Schedule Tasks**
   The **Schedule Task** dialog box appears.

3. Type in a **New Task Name**.

4. In the **Task Type** drop-down list, select **GroupShield for Exchange 7.0 AutoUpdate Task**.

5. Click **OK**. The created task is listed in the **Tasks** tab.

6. Send an agent wakeup call.

> For information on sending an agent wakeup call, refer to *Sending an Agent Wakeup call on page 50*.

Configuring an AutoUpdate task

After you have created a new AutoUpdate task, you can configure the task as required.

1. On the **Tasks** tab in the upper details pane, right-click the task, then select **Edit Task**.
   The **ePolicy Orchestrator Scheduler** dialog box appears.

2 Click **Settings**, edit the required options in both the **Task** and **Schedule** tabs. The **Update Task** page appears with message **No additional settings are required for this task**.

> AutoUpdate is configured to update the product with latest DATs, spam rules, spam and anti-virus engines from McAfee http/ftp website.

> You can also schedule the autoupdate task from the **ePolicy Orchestrator Agent Update** option in the **Schedule Task** dialog box.

On-Demand scan task

GroupShield for Exchange can perform on-demand scanning of your mails, so that all mails on your computer are checked for viruses, Trojan horses and other malicious code. You can create any number of on-demand scan schedules. The scan schedules can be configured to run at set intervals, and can be run at any time by the user. You can also disable schedules that you do not want to run automatically.

Creating a new task

1 Using an administrative account, log on to the computer containing ePolicy Orchestrator Server.

2 In the console tree under **ePolicy Orchestrator**, right-click **Directory** or the site, group or host, then select **Schedule Task**.
Alternatively, you click the **Tasks** tab in the upper details pane. Right-click in the pane, and select **Schedule Tasks**
The **Schedule Task** dialog box appears.

3 Type a **New Task Name**.

4 In the **Task Type** drop-down list, select **GroupShield for Exchange 7.0 On-Demand Task**.

5 Click **OK**. The created task is listed in the **Tasks** tab.

6 Send an agent wakeup call.

> For information on sending an agent wakeup call, refer to *Sending an Agent Wakeup call on page 50*.

Editing a task

1 Right-click the task and select the **Edit Task** option. The **ePolicy Orchestrator Scheduler** appears.

2 Click **Settings**. The **On-Demand Scan Configuration** page appears.

3 Deselect **Inherit**.

4 Select the desired on-demand policy from the list:

5 Click **OK**.

Scheduling settings

6 Click the **Schedule** tab.

Table 5-2 Schedule Options

Schedule Task	Select one of the available task type from the drop-down list. ■ Daily ■ Weekly ■ Monthly ■ Once ■ At System Startup ■ At Logon ■ When Idle ■ Run Immediately ■ Run on Dialup
Start Time ■ UTC Time ■ Local Time	■ Specify the start time for the scheduled task. Select the local time option to run the task using the scheduled interval at the client computer system time. This is useful for scheduling processor-intensive tasks (such as on-demand scans) to run during non-business hours. ■ Selecting the UTC Time option uses the Universal Time Conversion (also known as Greenwich Mean Time or GMT) to run the task. This option causes the task to run at the same time for all your clients regardless of the local system time on the client computers.
Enable randomization	The task does not run at exactly the specified start time. Instead, it starts after a random specified time. Specify the hours and minutes to enable randomization.
Run missed task	Ensures that the task is started if the computer is shutdown or otherwise not available at the scheduled start time. Selecting this option ensures that the task is run, the next time the computer becomes available.
Delay missed task by	Click **Advanced** on the **Advanced Schedule Options** dialog box. When running missed tasks, selecting this option sets a delay after the computer becomes available before the missed tasks runs.
Start Date / End Date	Click **Advanced** on the **Advanced Schedule Options** dialog box. Type the start and end dates if you only want the task to run for a specified period (such as for few days or weeks).

Table 5-2 Schedule Options

Repeat Task	Click **Advanced** on the **Advanced Scheduled Options** dialog box. Use this option to run a task multiple times in the same day. To do this, select **Repeat Task** and then set the repeat interval appropriately. Typically, you might do this to run a client update task several times a day, especially if there are a lot of new viruses. You can also schedule the task to repeat during other intervals, such as weekly or monthly.
Schedule Task Daily	Specify the interval to execute the schedule task; this could be an interval of 1 or several days. If you select 1, the schedule task is executed every other day.

Reports

From the ePolicy Orchestrator console, you can view reports which show how the GroupShield for Exchange installed on client computers is handling infections. You can check the configurations that have been set up on the hosts. You can save the selections you make in the **Report Data Filter** dialog box for future use.

ePolicy Orchestrator reports allow you to:

Set a directory filter to gather only the information that you want to view. When setting this filter, you can choose which part of the ePolicy Orchestrator console tree is included in the report.

- Set a data filter by using logical operators, to define precise filters on the data returned by the report.
- Generate graphical reports from the information in the database and filter the reports as desired. You can print the reports and export them for use in other software.

Running a report

1. Log on to the ePolicy Orchestrator database server under the **Reporting** section.
2. Select the desired **GroupShield for Exchange 7.0** report under **Reporting** | **ePO Databases** | **<database server>** | **Reports** | **<Product name>** in the console tree. The **Set Report Data filter** dialog box appears.
   - If **Yes** is selected, the **Report Data filter dialog** box appears for that category. Select the report (Agent Versions) you want to generate, then set the data filter in the **Report Data Filter** dialog box. Click **OK**.

- If **No** is selected, the complete report is shown.

> ℹ Tabs may vary based on which report is selected. See *ePolicy Orchestrator Product Guide v 3.6* for more details on all the available settings tabs.

Configuring reports

There are several ways in which you can control what data appears on reports. You can define the version number of virus definition files, scanning engines, and supported products that need to be installed on the client computers for them to be considered compliant based on your company’s anti-virus and security program. You can also limit the results of reports by selected product criteria. (For example, computer name, operating system, virus name or action taken on infected files.) Once the results of a report appear, you can then perform a number of tasks on the data. You can view details on required report data. (For example, to determine which client computers do not have a compliant version of GroupShield). Some reports even provide links to other reports called sub-reports that provide data related to the current report. You can also print reports or export report data into a variety of file formats (including HTML and Microsoft® Excel).

> ℹ See the *ePolicy Orchestrator v 3.6 Product Guide* for more details on configuring reports.

Uninstallation

Removing GroupShield for Exchange from Client Computer

Using the ePolicy Orchestrator server, you can uninstall the GroupShield software installed on a client computer.

Removing the GroupShield software from the client computer

1. From the **ePolicy Orchestrator** console, select the **Site** or the Exchange Server on which you intend to remove GroupShield and click the **Tasks** tab. The **Deployment Task** page appears.
2. Double-click the **Deployment task**. The **ePolicy Orchestrator Scheduler** dialog box appears.
3. Deselect **Inherit** under the **Tasks** tab and select **Enable (scheduled task runs at specified time)**.
4. Click **Settings** under the **Tasks** tab. The **Task Settings** page appears.

5 Deselect **Inherit**. From the listed products, select **Remove** from the list item given against **GroupShield for Exchange**.

6 Deselect **Run this task at every policy enforcement interval**.

7 Click **OK**.

8 Click **Schedule** tab. Deselect **Inherit**.

9 From the **Schedule Task** list item, select **Run Immediately** and click **Apply**.

10 Send an agent wakeup call.

> For information on sending an agent wakeup call, refer to *Sending an Agent Wakeup call on page 50*.

Removing GroupShield for Exchange from ePolicy Orchestrator

Removing the deployment package from ePolicy Orchestrator server

1 Using an administrative account, log on to the computer containing ePolicy Orchestrator Server.

2 Select **Repository** | **Software repositories** | **Master** in the console tree.

3 Select **GroupShield for Exchange** and click **Delete**. A confirmation dialog box appears. Click **OK** to remove GroupShield for Exchange from the ePolicy Orchestrator server.

Removing the product NAP file

1 Using an administrative account, log on to the computer containing ePolicy Orchestrator Server.

2 Select **Repository** | **Managed Products** | **Windows** | **GroupShield for Exchange** in the console tree.

3 Right-click **7.0** and select **Remove** to uninstall **GroupShield NAP** from the ePolicy Orchestrator server.

Removing the report NAP

1 Using an administrative account, log on to the computer containing ePolicy Orchestrator Server.

2 Select **Reporting** | **Repot Repository** | **groupshield7.0** in the console tree.

3 Right-click groupshield7.0 and select Remove to uninstall the report file from the ePolicy Orchestrator server.

6 Integrating with ePolicy Orchestrator 4.0

Introduction

This chapter describes how to configure GroupShield for Exchange using McAfee ePolicy Orchestrator management software version 4.0. To use this chapter effectively, you need to be familiar with ePolicy Orchestrator 4.0.

ePolicy Orchestrator 4.0 provides a scalable platform for centralized policy management and enforcement on your security products and systems on which they reside. It also provides comprehensive reporting and product deployment capabilities, all through a single point of control.

> This guide does not provide detailed information about installing or using ePolicy Orchestrator software. See *ePolicy Orchestrator v4.0 Product Guide*.

Pre-requisites for installing ePolicy Orchestrator 4.0

For Microsoft® Windows 2000 platform, install these files on your system:

- dotnetfx.exe
- msxml6-KB925673-enu-x86.exe
- WindowsInstaller-KB893803-v2-x86.exe

For Microsoft® Windows 2003 platform, install these files on your system:

- dotnetfx.exe
- msxml6-KB925673-enu-x86.exe

Before you begin

1. Create a temporary directory on the network or your local drive.
2. To install, do one of the following depending on how you obtained the software:

- Insert the CD into the computer's drive and copy the installation .ZIP files into the temporary directory you created.
- Download the ZIP files to the temporary directory

ePolicy Orchestrator agent

ePolicy Orchestrator agent is a distributed component of ePolicy Orchestrator that must be installed on each computer on the network. The agent collects and sends information between the ePolicy Orchestrator server, repositories and manages GroupShield for Exchange installations across the network.

Pre-requisites for using ePolicy Orchestrator 4.0

Before you can use the ePolicy Orchestrator software to manage GroupShield for Exchange, install the ePolicy Orchestrator agent on the computer.

Adding systems and deploying agents to the ePolicy Orchestrator server

1. Using an administrative account, log on to the ePolicy Orchestrator server.
2. Click **New Systems**. The **New Systems** page appears.
3. In **How to add systems**, choose **Deploy agents and add systems to the current group (My Organization)**.

   To add systems without deploying agents, choose the **Add systems to the current group (My Organization), but do not deploy agents** option. To deploy agent at a later time, perform steps given under the topic *Deploying an ePolicy Orchestrator agent on page 65*.

4. In **Systems to add**, click **Browse** to locate the system(s) you wish to add. The **Browse for Systems** page appears.
5. Select a **Domain** from the drop-down, which has the system(s) you want to add.
6. Under **Systems in Selected Domain**, select the desired system(s).

   To select all the systems in the chosen domain, click **Select all in this page**.

7. Click **OK** to return to the **New Systems** page.
8. Choose an appropriate **Agent version** from the drop-down and specify the **Installation options** and **Installation path** as required.

9 Enter the credentials (**Domain**, **User**, and **Password**) for agent installation, then click **OK**.

Deploying an ePolicy Orchestrator agent

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Systems**.

3 Choose a group in the **System Tree**.

4 Select the desired **Computer Name**(s) of that group.

5 Click **Deploy Agents**. The **Deploy McAfee Security Agent** page appears showing the **Target systems**.

6 Choose an **Agent version** to be installed on the selected systems.

> Agent versions available in the drop-down, depend on which agent, the installation packages are checked-in.

7 Choose the desired **Installation options** and an **Installation path** where you want to install the agent.

8 In **Credentials for agent installation**, specify **Domain**, **User**, **Password** of the user account with which you want to install the agent on selected systems and click **OK**.

Installation

Checking-in the McAfee GroupShield for Microsoft Exchange Server 2003/2007 package to the ePolicy Orchestrator server

You can check-in the GroupShield for Exchange software package from the **Master Repository** page. Master Repository is the central location for all McAfee updates residing on the ePolicy Orchestrator server. It retrieves user-specified updates from McAfee site or user-defined source sites.

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Software | Check In Package**. The **Package** page appears.

3 Choose the **Package type** as **Product or Update (.ZIP)** and browse in **File path** to locate **GroupShield7_ePO4.zip** saved in a temporary folder.

4 Click **Next**. The **Package Options** page appears with the **Package info**.

5 Choose the **Branch** as **Current**.

6 Click **Save**.

Installing GroupShield for Exchange on the client computer

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Systems | System Tree** and choose a desired group.

3 From the **Client Tasks** tab, click **Create Task**.

4 Type a **Name**, **Notes** for the task and choose the **Type** as **Product Deployment (McAfee Agent 4.0.0)**.

5 Click **Next**. The **Client Task Builder** page appears.

6 Under **Description**, select the **Target Platforms** as **Windows** to install the package.

7 Choose an appropriate **Language** from the drop-down.

8 In **Products to deploy**, select **GroupShield for Exchange 7.0.0** from the drop-down and choose the **Action** as **Install**.

9 In **Options**, select or deselect these options as required:

- **Run this task at every policy enforcement interval (Windows only)**
- **Run update after successful product deployment (4.0 or above)**

10 Click **Next** to schedule this task as desired.

11 Click **Next** to view a summary of the task, then click **Save**.

12 In the **Systems** tab, select a group and a computer where you want to install GroupShield 7.0.

> You can select all the computers in a group to install GroupShield 7.0 by clicking **Select all in the page**.

13 Send an agent wake-up call.

> For instructions on sending an agent wake-up call, please refer to *Sending an Agent Wakeup Call on page 70*.

Extensions

You can install, remove and manage the GroupShield for Exchange extension files. Extension files are in ZIP file format and must be installed before that product or component can be managed by ePolicy Orchestrator 4.0. The two extension files for GroupShield for Exchange are:

- GROUPSHD7000.ZIP
- GSE7REPORTS.ZIP

To install the GroupShield for Exchange policy extension files

1. Using an administrative account, log on to the ePolicy Orchestrator server.
2. Click **Configuration** | **Extensions** | **Install Extension**. The **Install Extension** dialog box appears.
3. Click **Browse**, select the extension file **GROUPSHD7000.ZIP** and click **OK**.

To install the GroupShield for Exchange report extension files

1. Using an administrative account, log on to the ePolicy Orchestrator server.
2. Click **Configuration** | **Extensions** | **Install Extension**. The **Install Extension** dialog box appears.
3. Click **Browse**, select the extension file **GSE7REPORTS.ZIP** and click **OK**.

Introducing ePolicy Orchestrator 4.0 Dashboard

Dashboards are a collection of pre-configured and/or user-selected monitors that provide current data about your detections.

The ePolicy Orchestrator dashboard consists of a collection of named dashboard monitors. Depending on the permissions assigned to your user account, you can create a new dashboard, manage existing dashboards, select active dashboards, and edit dashboard preferences

Creating a new dashboard

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Dashboards** | **Options** | **New DashBoard**. The **New DashBoard** page appears.

3 Enter a **Dashboard Name** and choose a desired **Dashboard Size** from the drop-down.

4 Click **New Monitor**.

5 Choose the **Category** as **Queries** and a desired GroupShield for Exchange related query from the **Monitor** drop-down menu.

6 Click **OK**.

7 Repeat step 4 and 5 for the remaining monitors.

8 Click **Save**. The **Make Active** dialog box appears.

9 Click **Yes** to add this new dashboard to your active set.

Table 6-1 Dashboard Options

Options	**Description**
Dashboard Name	Specifies the name of the dashboard you select.
Dashboard Size	Specifies the dimensions (by number of dashboard monitors) of the selected dashboard.
Created by	Specifies the user name who created the selected dashboard.
Last modified by	Specifies the user name, date and time stamp of the last modification made to the selected dashboard.
Edit	Takes you to the **Edit Dashboard** page where you can make changes to the dashboard’s name and size.
Delete	Deletes the selected dashboard.
Duplicate	Creates and saves a copy of the selected dashboard. This allows you to create and edit similar dashboards without having to create one from scratch.

Table 6-1 Dashboard Options

Options	Description
Make Public	Adds the selected private dashboard to the Public Dashboards list, making it available to all users with permissions, to use public dashboards.
Make Active	Adds the selected dashboard to the Dashboards tab for easy access.

Reporting

Reports are pre-defined queries which queries the ePolicy Orchestrator database and generates a graphical output.

ePolicy Orchestrator 4.0 has its own querying and reporting capabilities. McAfee includes a set of default queries on the left pane. However, you can create a new query, edit, and manage all the queries.

Running a query

1. Using an administrative account, log on to the ePolicy Orchestrator server.
2. Click **Reporting**. A list of queries appears on the left pane.
3. Choose a GroupShield for Exchange related query from the list.
4. Click **Run**. The graphical output is displayed.

Creating a new query

If the pre-defined queries on the left side does not serve your purpose, ePolicy Orchestrator enables you to create your own queries.

1. Using an administrative account, log on to the ePolicy Orchestrator server.
2. Click **Reporting | New Query**. The **Result Type** page appears.
3. On the left pane, choose a desired data type that the query should retrieve and click **Next**. The **Chart** page appears.
4. Choose and accordingly configure a display chart/table and click **Next**.
5. The **Columns** page appears allowing you to select columns for the chart/table.
6. Select a columns from the **Available Columns** pane and click **Next**.

7 The **Filter** page appears. Specify criteria by selecting properties and operators to limit the data retrieved by the query.

8 Click **Run**, then **Save**. The **Save Query** page appears.

9 Enter a **Name** and **Notes** (if required) for the query, then click **Save**.

Table 6-2 Reporting Options

Options	Description
Delete	Deletes a selected query.
Edit	Launches the **Query Builder** page loaded with the details of the selected query, where you can edit any details of the selected query.
Make Public	Moves the selected query from **My Queries** list to the **Public Queries** list, making it available to all users with permissions.
Duplicate	Creates and saves a copy of the selected query.
Export	Exports the selected query to an XML file that can be imported to any ePolicy Orchestrator server.
Run	Runs the selected query and displays its result.
More Actions | View Query SQL	Takes you to the **View Query SQL** page, where you can view and copy the SQL script of the selected query.
Import Query	Launches a dialog box that allows you to browse to an exported query file. When you import a query file, the server adds it to **My Queries** list.

Systems

All the systems in the network are managed in the **Systems** tab. The **System Tree** contains all systems that are managed by the ePolicy Orchestrator. It is the primary interface for managing policies and tasks on these systems. You can organize or sort these systems into logical groups in the **System Tree**.

My Organization is the root of the **System Tree**. It includes a **Lost&Found** group that stores systems whose locations cannot be determined by the server. Depending on the methods you use to create and maintain the **System Tree** segments (systems), the server uses different characteristics to place the systems in the **System Tree**.

For information on adding a new system, refer to the *ePolicy Orchestrator 4.0 Product Guide*.

Sending an Agent Wakeup Call

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Systems**.

3 Choose a group in the System Tree.

4 Select the desired Computer Name(s) of that group.

5 Click More Actions | Wake Up Agent. The Wake Up Agents page appears.

6 Choose a Wake-up call type and a Randomization period (0-60 minutes) during which the system(s) respond to the wakeup call sent by the ePolicy Orchestrator server.

7 Select Get full product properties for the agent(s) to send complete properties instead of sending only those that have changed since the last agent-to-server communication.

8 Click OK.

> Navigate to Server Task Log to see the status of the agent wakeup call.

Policies

You can create, edit, delete or assign a policy to a specific group/system in the System Tree.

Creating a new policy

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click Systems | System Tree and choose a desired group.

3 From Policies, select the desired Product from the drop-down. A list of policies managed by the chosen point product appears in the lower pane.

4 Locate a desired policy category, then click Edit Assignment. The Policy assignment for: My Organization| Lost& Found | (chosen group) page appears.

5 Click Create new policy. The Create a new policy dialog box appears.

6 Choose McAfee Default or My Default as desired.

> The McAfee Default policies are read-only and cannot be edited, renamed, or deleted.

7 Enter a New policy name.

8 Click OK, then Save.

Enforcing Policies

You can enforce a policy to multiple managed systems within a group.

1. Using an administrative account, log on to the ePolicy Orchestrator server.
2. Click **Systems** | **System Tree** and choose a desired group.
3. Select the desired system(s).
4. Click **Assign Policy**. The **Assigning Policy for <n> system** page appears.
5. Select the desired **Product**, **Category**, and **Policy** from the drop-down, then click **Save**.
6. Select the systems again.
7. Send an agent wakeup call.

ⓘ For instructions on sending an agent wake-up call, please refer to *Sending an Agent Wakeup Call on page 70*.

ⓘ You can create and enforce GroupShield policies and view reports only after adding the GroupShield extension files.

Client tasks

ePolicy Orchestrator allows you to create, schedule and maintain client tasks that run on the managed systems. You can define client tasks for the entire **System Tree**, a specific group, or an individual system.

Using ePolicy Orchestrator 4.0, you can create these types of scheduled tasks for the GroupShield for Exchange software:

- AutoUpdate
- OnDemand scan

ⓘ The client tasks available in the drop-down depend on the extension files installed.

AutoUpdate task

Your software can only provide full protection if you keep it up-to-date with the latest anti-virus definitions (DATs), anti-spam rules, spam engine and virus-scanning engine. We recommend that you update DAT files daily and regularly check the McAfee AVERT (Anti-Virus Emergency Response Team) website for new DAT files.

Creating a new autoupdate task

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Systems** | **System Tree** and choose a desired group.

3 From the **Client Tasks**, select the desired group in the **System Tree** for which you want to create the autoupdate task.

4 Click **Create Task**. The **Client Task Builder** page appears.

5 Under **Description**, type a **Name** and **Notes** (if required) for the autoupdate task.

6 Choose **AutoUpdate Task (GroupShield for Exchange 7.0.0)** as the **Type** of the task and click **Next**.

7 Schedule the task as desired and click **Next** to view the **Summary** of the autoupdate task, which includes the **Name**, **Notes**, **Product**, **Type** of the task, and the **Schedule** information.

8 Click **Save**.

9 Send an agent wake-up call.

> For instructions on sending an agent wake-up call, please refer to *Sending an Agent Wakeup Call on page 70*.

> Click **Edit** to change the description/schedule of an autoupdate task or **Delete** to remove it.

On-Demand scan task

You can create any number of on-demand scan schedules. The scan schedules can be configured to run at set intervals or can be run at any time by the user.

Creating an on-demand scan task

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Systems** | **System Tree** | **Client Tasks**.

3 Select the desired group in the **System Tree** for which you want to create the on-demand scan task.

4 Click **Create Task**. The **Client Task Builder** page appears.

5 Under **Description**, type a **Name** and **Notes** (if required) for the on-demand scan task.

6 Choose **On Demand Scan (GroupShield for Exchange 7.0.0)** as the **Type** of the task and click **Next**.

7 Under **Configuration**, choose a policy from the drop-down.

8 Click **Next** and schedule the task as desired.

9 Click **Next** to view the **Summary** of the on-demand scan task, which includes the **Name**, **Notes**, **Product**, **Type** of the task, and the **Schedule** information.

10 Click **Save**.

11 Send an agent wakeup call.

> For instructions on sending an agent wake-up call, please refer to *Sending an Agent Wakeup Call on page 70*.

> Click **Edit** to change the description/schedule of an on-demand scan task or **Delete** to remove it.

Uninstallation

Removing GroupShield for Exchange from the client computer

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Systems | System Tree** and choose a desired group.

3 From the **Client Tasks** tab, click **Create Task**.

4 Type a **Name**, **Notes** for the task and choose the **Type** as **Product Deployment (McAfee Agent 4.0.0)**.

5 Click **Next**. The **Client Task Builder** page appears.

6 Under **Description**, select the **Target Platforms** as **Windows** to uninstall the package.

7 Choose an appropriate **Language** from the drop-down.

8 In **Products to deploy**, select **GroupShield for Exchange 7.0.0** from the drop-down and choose the **Action** as **Remove**.

9 In **Options**, select or deselect these options as required:

- **Run this task at every policy enforcement interval (Windows only)**

- Run update after successful product deployment (4.0 or above)

10 Click **Next** to schedule this task as desired.

11 Click **Next** to view a summary of the task, then click **Save**.

12 In the **Systems** tab, select a group and a computer where you want to install GroupShield 7.0.

> You can select all the computers in a group to install GroupShield 7.0 by clicking **Select all in the page**.

13 Send an agent wake-up call.

> For instructions on sending an agent wake-up call, please refer to *Sending an Agent Wakeup Call on page 70*.

Removing GroupShield for Exchange from the ePolicy Orchestrator server

Removing the deployment package from ePolicy Orchestrator

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Software** | **Master Repository**.

3 Click the **Delete** link of the GroupShield for Exchange package.

Removing the product extension

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Configuration**.

3 Choose the extension file **GroupShield for Exchange**, click **Remove**.

4 Select the option **Force removal, bypassing any checks or errors**.

5 Click **OK**.

Removing the report extension

1 Using an administrative account, log on to the ePolicy Orchestrator server.

2 Click **Configuration**.

3 Choose the extension file GroupShield for Exchange Reports, click **Remove**.

4. Select the option Force removal, bypassing any checks or errors.
5. Click OK.

7 Integrating with ProtectionPilot 1.5

Introduction

ProtectionPilot software is a security management system that simplifies anti-virus management tasks for network administrators who manage up to 500 computers. Management consists of deploying (sending and installing) anti-virus products, configuring product settings, and keeping those products up-to-date. Here you register and configure GroupShield for Exchange to be managed through ProtectionPilot. When you first log on to the server, the console displays the current level of protection. This guide describes how to configure GroupShield for Exchange using McAfee ProtectionPilot software version 1.5. To use this guide effectively, you need to be familiar with ProtectionPilot.

This guide does not provide detailed information about installing or using ProtectionPilot software. See *ProtectionPilot v1.5 Product Guide.*

Pre-requisites for using ProtectionPilot

Before you can use the ProtectionPilot software to manage GroupShield for Exchange:

- Check-in the appropriate package and NAP file for GroupShield for Exchange to the ProtectionPilot repository.
- Install the ProtectionPilot agent on your computer.

Introducing ProtectionPilot

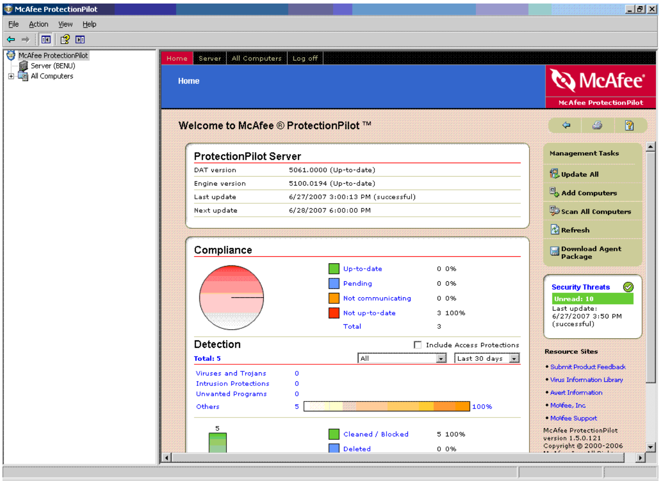
The Microsoft® Management Console (MMC) is your interface to the ProtectionPilot product and its features. Here you register and configure your GroupShield for Exchange products that are managed through ProtectionPilot. The console uses the standard MMC features.

The console is divided into two panes. When you first log on to the server, the console appears with the Console Root highlighted in the left pane.

- The console tree is the navigation pane of the console. It shows the servers, workstation, and appliances that you can administer using ProtectionPilot.
- The details pane is to the right of the console. Depending on the item selected in the console tree, the details pane might have an upper details pane and lower details pane.

The console's appearance changes to reflect the items you have selected in the console tree or in the details pane.

Figure 7-1 ProtectionPilot console



Welcome to McAfee ® ProtectionPilot ™

ProtectionPilot Server

DAT version	5061.0000 (Up-to-date)
Engine version	5100.0194 (Up-to-date)
Last update	6/27/2007 3:00:13 PM (successful)
Next update	6/28/2007 6:00:00 PM

Compliance

🟩	Up-to-date	0	0%
🟦	Pending	0	0%
🟧	Not communicating	0	0%
🟥	Not up-to-date	3	100%
	Total	3	

Detection

☐ Include Access Protections

Total: 5

All

Last 30 days

Viruses and Trojans	0	
Intrusion Protections	0	
Unwanted Programs	0	
Others	5	100%

5

🟩	Cleaned / Blocked	5	100%
🟦	Deleted	0	0%

Security Threats ✓
Unread: 10
Last update:
6/27/2007 3:50 PM
(successful)

McAfee ProtectionPilot
version 1.5.0.121
Copyright © 2000-2006

The McAfee Common Agent is the key to remotely managing products. Installed on each computer, it deploys products, updates virus definition (DAT) files and the virus-scanning engine, upgrades existing products with service pack and patch releases. It also gathers data about installed anti-virus products, the computer, and infection and system activity. In addition, it ensures that requests from the server are executed and re-executed or enforced as needed. For example, if a user removes the anti-virus product you have defined for the computer, the agent will reinstall the product automatically.

Assumptions:

- Computer 1: ProtectionPilot is installed and configured on a supported operating system.
- Computer 2: Microsoft® Exchange Server 2003 or 2007 is installed and configured on the server.

- Exchange Server is added into the ProtectionPilot’s managed server list under the “Directory” branch.
- McAfee Common Agent installed on the ProtectionPilot server.
- From ProtectionPilot server console, ProtectionPilot agent is installed or pushed on the Exchange Server.

Before you begin

1. Create a temporary directory on the network or your local drive.
2. To install, do one of the following depending on how you obtained the software:
   - Insert the CD into the computer’s drive and copy the installation files into the temporary directory you created.
   - Download the NAP and pkgCatalog.z archive and extract the file to the temporary directory.

> Anti-Spam and Anti-Phish feature is only available if you install McAfee Anti-Spam for GroupShield component after installation. To install and deploy Anti-Spam and Anti-Phish, you need to check-in the required package into the repository and then deploy. If you have deployed the evaluation package and want to upgrade to the licensed version, you must check-in the licensed package and then deploy.

Installation

Adding McAfee GroupShield for Exchange pkgCatalog.z file to the ProtectionPilot server:

1. Locate the pkgCatalog.z file.
2. Log on to the ProtectionPilot server with administrative rights.
3. From the **Server** page, select **Repository** tab. In **Management Tasks**, click **Check In Package**. The **Check in Package Wizard** appears.
4. Select **Products and Updates** and click **Next**. Browse and select the McAfee GroupShield for Exchange **pkgCatalog.z** file you saved to a temporary folder in Step 1.
5. Click **Open** to enable ProtectionPilot to load package file.
6. Click **Finish** to enable ProtectionPilot to load the **pkgCatalog.z** file.

Adding McAfee GroupShield for Exchange NAP file to the ProtectionPilot server:

1. Locate the NAP file, on the product CD or in the installation .ZIP file downloaded from the McAfee website, and save it to a temporary folder accessible from the ProtectionPilot server.
2. Log on to the ProtectionPilot server with administrative rights.
3. From the **Server** page, select the **Repository** tab. In **Management Tasks**, click **Check In Package**. The **Check in Package** wizard appears.
4. Select **Management NAP** and click **Next**. Browse and select McAfee GroupShield GSEWIN70.nap file you saved to a temporary folder in Step 1.
5. Click **Finish** to enable ProtectionPilot to load the NAP file.

Deploying McAfee GroupShield using ProtectionPilot server:

1. Select the required **Site**, **Group** or **Computer** in the ProtectionPilot directory and select the **Tasks** tab.
2. Modify the **Deployment** task to deploy and install McAfee GroupShield for Exchange.

Configuring GroupShield policies

This section explains how you enforce policies from ProtectionPilot. There are two main steps:

1. Within ProtectionPilot, you select the names of the target computers on the network and the policies that will apply to those selected computers. The ProtectionPilot Agent installed on all those target computers and you can set up a number of different policies that will apply to many individual computers or groups of computers.
2. You set ProtectionPilot to enforce those policies on computers. The agent communicates with the server to check for new policies. Each computer then observes your new policy, ignoring any polices that were previously configured at GroupShield for Exchange.

Setting and enforcing policies

The ProtectionPilot console allows you to enforce policies across groups of computers or on a single computer. These policies override configurations set on individual computers. For information regarding policies and how they are enforced, see the *ProtectionPilot Product Guide*.

Before configuring any policies, select the group of computers for which you want to modify GroupShield policies. You can modify GroupShield policies from the pages and tabs that are available in the details pane of the ProtectionPilot console. These pages are nearly identical to those you can access directly from the GroupShield user interface.

After you have modified the appropriate policies and saved the changes for the intended computer or group of computers, you are ready to deploy the new settings via the ProtectionPilot agent.

Modifying policies for GroupShield in ProtectionPilot

1. Log on to the ProtectionPilot server.
2. In the console tree under **McAfee ProtectionPilot | <SERVER> | Directory**, select the site, group, single computer, or the entire directory to which these policies are to apply.
3. The **General**, **Policies**, **Scheduled Tasks**, and **Agent Log** tabs appear in the details pane.
4. Click the **Policies** tab and then the **GroupShield for Exchange** link. The **Policy Settings** page appears with **Scanner Settings** as the default policy category.
5. Deselect **Inherited** and modify the policy settings as required.

> For more information on modifying the policy settings, refer to *the chapter Policy Manager on page 105*.

Setting debug logging

1. Log on to the ProtectionPilot server.
2. In the console tree under **McAfee ProtectionPilot | <SERVER> | Directory**, select the site, group, single computer, or the entire directory to which these policies are to apply.
3. The **General**, **Policies**, **Scheduled Tasks**, and **Agent Log** tabs appear in the details pane.
4. Click the **Policies** tab and then the **GroupShield for Exchange** link.
5. Select **Diagnostics** from the drop-down menu. The **Diagnostics** page appears.
6. Click **Debug Logging** tab.

7 Select the debug logging Level. you can select:

- **High** - to collect large number of log entries.
- **Medium** - to collect medium number of log entries.
- **Low** - to collect low number of log entries.
- **None** - to disable debug logging.

8 Select **Limit size of debug log files** option to specify whether there should be a size limit for debug log files. You can specify how large (in megabytes or kilobytes) the debug log files can be.

9 Select **Specify location for debug log files** option to use the default location for debug files, or use a different location. If you are specifying a new location, in the first field select the type of location, and in the second field enter the location details.

Setting error reporting service

1 Click **Error Reporting Service** tab.

2 Select **Enable** to enable or disable the error reporting service.

3 Select **Catch exceptions** to capture information about exceptional events, such as system crashes.

4 Select **Report exceptions to user** to specify whether exceptions should be reported to the administrator.

Setting event logging

1 Click **Event Logging** tab, you can specify which events should be included in the **Product Log** and **Event log**.

2 Select **Write Information events**, **Write warning events**, or **Write errors events** for inclusion into the product log.

3 Select **Write Information events**, **Write warning events**, or **Write errors events** for inclusion into the event log.

Setting product log

1 Click the **Product Log** tab.

2 Select **Specify location of database** to specify whether you want to use the default location for the product log or specify a different location. If deselected, the default location is used.

3 Specify the **Database location** or specify a different location for the product log. Use the first field to tell the software about the type of location you are going to specify in the second field. For example, if you select **Full Path** in the first field, enter the full path name in the second field. If you select a location, specify the file name, or sub-directory path and file name.

4 Select the **filename of database** option to specify whether you want to use the default file name, or specify a different name. If deselected, the default file name is used. The default file name is **productlog.bin** or type the **Database filename** to specify a different file name for the product log.

5 Select **Limit database size** to limit the size of the product log database.

6 Type the **Maximum database size** that the product log database can be. You can specify the size in either megabytes or kilobytes.

7 Select **Limit age of entries**, if you want the product log entries to be deleted after a set period of time.

8 Type the **Maximum age of entry** to specify how many days an entry should remain in the database before it is deleted.

9 Select **Specify a query timeout** to limit the amount of time allowed for answering a product log query.

10 Type the **Query timeout (seconds)** to specify the maximum number of seconds allowed when answering a product log query.

Scheduling tasks

This chapter explains how you enforce policies from ProtectionPilot. GroupShield can perform on-demand scanning for your Exchange Server.

Settings and actions can be specified in on-demand policies, which can be found under the **Policy Manager**. There are three set of policies which can be used for an on-demand task. These are:

- **On-Demand (Remove Viruses)** - Policies in this set contain anti-virus settings and filters. These policies provide an easy means to check against viral content in databases.
- **On-Demand (Remove Banned Content)** - Policies in this set contain content scan settings. These policies are particularly useful if you want to see the effect of newly created/assigned content scan rules.

- **On-Demand (Full Scan)** - Policies in this set contain settings for all scanners and filters. These policies will be the typically used for scanning at regular intervals.

Creating a new on-demand scan task

1 Log on to the ProtectionPilot server.

2 In the console tree under **McAfee ProtectionPilot | <SERVER> | Directory**, select the site, group, single computer, or the entire directory to which these policies are to apply.

3 The **General**, **Policies**, **Scheduled Tasks**, and **Agent Log** tabs appear in the details pane.

4 Click the **Scheduled Tasks** tab. The **Scheduled Tasks for Computer** <computer name> page appears.

5 Click **Create Task**. The **Tasks Types** page appears.

6 Click **GroupShield for Exchange** with the **Task type** as **OnDemand Scan Task**.

7 Click **Next**. The **Task Settings** page appear.

8 Enter a **Name** for the task.

9 Under **Schedule Settings**, deselect **Inherit**.

10 Select the option **Enable (Schedule task that run at specified time)** to enable the on-demand scan task.

11 Select the next option if you want to stop the task after it has run for a certain time. Specify the hours and minutes to stop the scan.

12 Select an interval from the drop-down to schedule the scan **Immediately**, **Once**, **Hourly**, **Daily**, **Weekly**, or **Monthly** and specify their appropriate options as you require.

13 Click **Apply Settings**. The new task you have created appears in the **Scheduled Tasks** page showing the task type as **OnDemand Scan Task**.

Select a desired task and click the **Edit** button to edit the settings of this task, or click **Delete** to delete the task when it is no longer required.

Creating a new AutoUpdate task

1 Log on to the ProtectionPilot server.

2 In the console tree under **McAfee ProtectionPilot | <SERVER> | Directory**, select the site, group, single computer, or the entire directory to which these policies are to apply.

3 The **General**, **Policies**, **Scheduled Tasks**, and **Agent Log** tabs appear in the details pane.

4 Click the **Scheduled Tasks** tab. The **Scheduled Tasks for Computer** <computer name> page appears.

5 Click **Create Task**. The **Tasks Types** page appears.

6 Click **GroupShield 7.0 for Exchange** with the **Task type** as **AutoUpdate Task**.

7 Click **Next**. The **Task Settings** page appear.

8 Enter a **Name** for the task.

9 Under **Schedule Settings**, deselect **Inherit**.

10 Select the option **Enable (Schedule task that run at specified time)** to enable the on-demand scan task.

11 Select the next option if you want to stop the task after it has run for a certain time. Specify the hours and minutes to stop the scan.

12 Select an interval from the drop-down to schedule the scan **Immediately**, **Once**, **Hourly**, **Daily**, **Weekly**, or **Monthly** and specify their appropriate options as you require.

13 Click **Apply Settings**. The new task you have created appears in the **Scheduled Tasks** page showing the task type as **AutoUpdate Task**.

Select a desired task and click the **Edit** button to edit the settings of this task, or click **Delete** to delete the task when it is no longer required.

Uninstallation

Removing McAfee GroupShield for Exchange from the client computer using ProtectionPilot server

1 Select the required **Site**, **Group** or **Computer** in the ProtectionPilot directory.

2 From **Management Tasks**, click **Uninstall Products**, then **Next**. The **Uninstall Products Wizard** appears, with the option to delete the **Product Name** and **Version** from the ProtectionPilot console. You can also uninstall GroupShield for Exchange from the client system by selecting **GroupShield for Exchange** from the **List**.

3 Click **Yes** to remove the installation.

Removing the McAfee GroupShield for Exchange pkgCatalog.z package file from ProtectionPilot repository

1 Log on to the ProtectionPilot server with administrative rights.

2 Select the GroupShield for Exchange under **Repository** | **View contents of Server Repository**.

3 Select GroupShield for Exchange with the **Type** as **Install** from the **View contents of server repository** list.

4 Click **Delete** to uninstall GroupShield for Exchange package file from the server.

Removing the McAfee GroupShield for Exchange NAP file from ProtectionPilot server

1 Log on to the ProtectionPilot server with administrative rights.

2 Select GroupShield for Exchange under **Repository** | **View contents of server repository**.

3 Select GroupShield for Exchange with the **Type** as **NAP** from the **View contents of server repository** list.

4 Click **Delete** and then **OK** to uninstall GroupShield for Exchange NAP file from the server.

8 Getting Started with the User Interface

The user interface provides critical function for GroupShield administrators. It is important for the administrators to know how well their server is being protected from viruses and banned content. Dashboard is your interface to the GroupShield for Exchange.

The left pane of the console has links namely **Dashboard**, **Detected Items**, **Policy Manager**, and **Settings and Diagnostics** that you can administer. The right pane shows information depending on the item you select in the left pane.

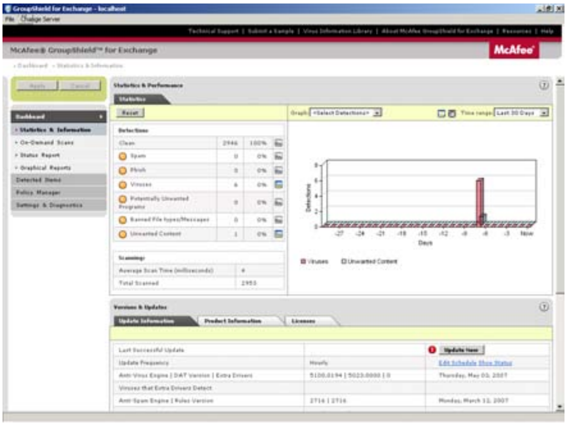
To start GroupShield for Exchange user interface:

1. Start **McAfee GroupShield for Exchange** from the icon on the desktop.
2. You can also start GroupShield for Exchange by clicking on **Start** | **Programs** | **McAfee** | **GroupShield for Exchange**. Select either **GroupShield for Exchange** or **GroupShield for Exchange (Web)** as desired.

Dashboard

The dashboard provides an overview of the scanning details, latest detections, graphical view of these detections, product updates and versions, a list of recently scanned items, anti-virus news, and security news.

Figure 8-1 Dashboard



Detections		
Clean	2946	100%
Spam	0	0%
Phish	0	0%
Viruses	6	0%
Potentially Unwanted Programs	0	0%
Banned File types/Messages	0	0%
Unwanted Content	1	0%

Scanning	
Average Scan Time (milliseconds)	4
Total Scanned	2953

Last Successful Update		
Update Frequency	Hourly	
Anti-Virus Engine | DAT Version | Extra Drivers	5100.0194 | 5023.0000 | 0	Thursday, May 03, 2007
Viruses that Extra Drivers Detect		
Anti-Spam Engine | Rules Version	2716 | 2716	Monday, March 12, 2007

Dashboard has four pages:

- *Statistics & Information*
- *On-Demand Scans*
- *Status Report*
- *Graphical Reports*

Statistics & information

The **Statistics & Information** page is further divided into three sections:

- *Statistics*
- *Versions & Updates*
- *Reports*

Statistics

This section shows you the percentage and the number of clean items, detected spam, phish, viruses, PUPs, banned file types/messages and unwanted content. It also shows you the average scan time (in milliseconds) and the total number of email messages scanned.

Click **Reset** to reset the statistics of detected items. From the **Graph** drop-down menu, select one of these:

- **<Select Detections>** — Select the counters in the **Detections** section by clicking on the icon of an item. This enables you to view the statistics and graph of the selected counters.
- **Spam Summary** — View spam statistics and graph.
- **Phish Summary** — View phish statistics and graph.

Click the **Display bar graph** icon or **Display pie chart** icon as required, to view the graphical display of detections. You can choose **Time Range** from the drop-down menu to view these graphs. The options for the time range are:

- **Last 24 Hours**
- **Last 7 Days**
- **Last 30 Days**

Versions & updates

This section has three tabs:

- **Update Information**: This tab shows the latest instant when the anti-virus engine and DAT files were successfully updated. It shows how frequently this update was done. It also shows the version of anti-virus engine, DAT files, and anti-spam engine (if you have chosen to install the Anti-Spam for GroupShield). You can view the status of the last update (the **Show Status** link) and schedule a new updating frequency (the **Edit Schedule** link).

  McAfee Security regularly provides updated Virus Definition (DAT) files to detect and clean the latest virus threats. Click **Update Now** to update the most up-to-date virus protection available.

- **Product Information**: This tab shows the product name and version, the Service Pack, HotFix information and the condition of the buffer overflow protection.

A buffer overflow is an anomalous condition where a process attempts to store data beyond the boundaries of a fixed-length buffer. This results in extra data overwriting the adjacent memory locations. Enabling **Buffer Overflow Protection** prevents this condition.

- Licenses: This tab gives the description of the installed product(s), the type of license, expiry date (if the license type is Beta), and the number of day(s) remaining for the license to expire.

Reports

This section has three tabs:

Recently Scanned Items: This tab shows a list of recently scanned items. It also shows the date and time of scan, sender's and recipient's details, the action taken after the scan, name of the document scanned, name of the detection, type of scan task, reason for the item being detected, and the policy name chosen.

Anti-Virus News: This tab shows a list of headlines containing the latest anti-virus news published by a company on a particular date. This is to bring awareness about the latest virus threats and vulnerabilities. Click on the link of a headline to read the news in a web page.

Security News: This tab shows a list of headlines published on a particular date containing the latest information about the IT security. Click on the link of a headline to view security information in a web page.

On-demand scans

On-demand scan is a method for scanning emails at convenient times or regular intervals. You can schedule regular scan operations when the server activities are comparatively low and when they do not interfere with your work.

GroupShield for Exchange enables you to create scheduled on-demand scans. You can create multiple schedules, each running automatically at predetermined intervals or times.

You may want to perform an on-demand scan for these reasons:

- To check a specific file or files that have been uploaded or published.
- To check if the documents within the Exchange Server are virus-free, possibly following DAT update, in case new viruses can be detected.
- If you have detected and cleaned a virus/spam/phish and want to check if your computer is completely clean.

Scheduling a new on-demand scan

1 Click Dashboard | On-Demand Scans. The On-Demand Scans page appears.

2 Click New Scan. The Schedule an on-demand scan page appears.

3 In **Choose when to scan**, choose any of these options:

- **Not scheduled** — Select the checkbox and specify the number of hours and minutes after which the scanning has to stop.
- **Once** — From the respective drop-down lists, choose a date, month, year and the time when a scan has to start. You can select the checkbox and specify the number of hours and minutes after which the scanning has to stop.
- **Hours** — Specify how frequently, the scan task should take place (in hours), and at how many minutes past the hour. You can select the checkbox and specify the number of hours and minutes after which the scanning has to stop.
- **Days** — Specify the time how frequently, in days, the task should take place and at what time of the day. You can select the checkbox and specify the number of hours and minutes after which the scanning has to stop.
- **Weeks** — Specify how frequently, in weeks, the task takes place. You can also specify on which days and at what time of day the task should take place. You can select the checkbox and specify the number of hours and minutes after which the scanning has to stop.
- **Months** — On either the first, second, third, fourth or a last day, select a checkbox by clicking on desired month(s) and specify a time at which a scan has to start. You can select the checkbox and specify the number of hours and minutes after which the scanning has to stop.

4 Click **Next**. In the **Choose what to scan** page, select the desired folder(s) and click >> to move the folder(s) from **Available folders** to **Folders to scan**.

> Click >>> to select a folder and all its subfolders.

5 Choose any of these options:

- **Scan all folders** — All folders in **Folders to scan** will be scanned.
- **Scan selected folders** — Selected folders in **Folders to scan** will be scanned.
- **Scan all except selected folders** — Folders except the selected ones in **Folders to scan** will be scanned.

6 Click **Next**. In the **Configure scan settings** page, choose a **Policy to use** from the drop-down list. The options are:

- **On Demand**
- **Find Viruses**

- Remove Viruses
- Find Banned Content
- Remove Banned Content
- Full Scan

7 Select **Resumable Scanning** to enable **Restart from last item**.

> Using this option, you can specify whether a scan can restart from the point where it was stopped.

8 Click **Next**.

9 **Enter a name** for the task.

10 Click **Finish**, then **Apply**.

Modifying an existing on-demand scan

1 Click **Dashboard | On-Demand Scans**. The **On-Demand Scans** page lists all the on-demand scans.

2 Click the **Modify** link of the scan task you wish to modify.

3 Make the required changes in **Choose when to scan**. Click **Next**.

4 Select the desired folders by moving them to **Folder to scan**. Click **Next**.

5 Choose a desired policy from the drop-down list and choose if you want to restart scan from the last item. Click **Next**.

6 Type a new name for the task.

7 Click **Finish**, then **Apply**.

Deleting an on-demand scan

1 Click **Dashboard | On-Demand Scans**. The **On-Demand Scans** page appears listing all the on-demand scans.

2 Click the **Delete** link of the scan task.

> The status of the task that you have deleted changes to **Marked for deletion**. Click **Undo Delete** if you do not want to delete the task.

3 Click **Apply**.

The ‘Run Now’ link

Once you have scheduled a new task, you can run a scan.

> This option is available only if you click **Apply** after creating a new scan task.

1 Click **Dashboard | On-Demand Scans**. The **On-Demand Scans** page lists all the on-demand scans.

2 Click the **Run Now** link of the task you wish to start. A confirmation dialog box appears.

3 Click **OK** to run the on-demand scan immediately.

> Click **Refresh** to update the schedule summary information.

Status report

A status report is a scheduled report sent to an administrator at a specific time. The report contains detection statistics within that specified time frame. You can choose a time, recipient email address/distribution list to send the report to, and a subject for the email. Reports are sent in HTML format.

Scheduling a new status report

1 Click **Dashboard | Status Report**. The **Status Report** page appears.

2 Click **New Report**. The **Report** page appears.

3 In the **when to report** page, choose any of these options:

- **Not scheduled** — Select the checkbox to set up a reporting task that you can activate later. If you are modifying a report schedule, this option allows you to stop an existing report task.
- **Once** — From the respective drop-down lists, choose a date, month, year and the time when a report task has to start. You can select the checkbox and specify the number of hours and minutes after which the report task has to stop.
- **Hours** — Specify how frequently, the report task should take place (in hours), and at how many minutes past the hour. You can select the checkbox and specify the number of hours and minutes after which the report task has to stop.

- **Days** — Specify the time how frequently, in days, the report task should take place and at what time of the day. You can select the checkbox and specify the number of hours and minutes after which the report task has to stop.
- **Weeks** — Specify how frequently, in weeks, the report task should take place. You can also specify on which days and at what time of day the task should take place. You can select the checkbox and specify the number of hours and minutes after which the report task has to stop.
- **Months** — On either the first, second, third, fourth or a last day, select a checkbox by clicking on a desired month(s) and specify a time at which a report task has to start.
  You can select the checkbox and specify the number of hours and minutes after which the report task has to stop.

4 Click **Next**. The **Who to report to** page appears.

5 In **Recipient Email**, specify the recipient's email address to whom the report is to be sent.

6 In **Subject line for report**, specify the subject line in the report that is sent to the recipient.

7 Click **Next**. The **Please enter a task name** page appears.

8 Type a meaningful name for the task.

9 Click **Finish**.

Click the **Modify** link of a report task to modify its settings or click the **Delete** link of a report task to delete it.

The 'Run Now' link

Once you have scheduled a new task, you can run a report task.

This option is available only if you click **Apply** after creating a new report task.

1 Click **Dashboard | Status Report**. The **Status Report** page lists all the report tasks.

2 Click the **Run Now** link of the task you wish to start. A confirmation dialog box appears.

3 Click OK.

> Click **Refresh** to update the schedule summary information.

Graphical reports

The **Graphical Reports** section gives an explicit view of a graph of detected items. You can also find each detection by setting filters to specify the type of detections that are of interest.

Graphical Reports has two tabs:

- Simple
- Advanced

Simple reports

Viewing simple graphical reports:

1. Click **Dashboard | Graphical Reports**. The **Graphical Reports** page appears with the **Simple tab**, by default.
2. From **Time Span**, choose **Today** or **This week** to view only today's detections or detections made in the last 7 calendar days (including today's date).
3. From **Filter**, choose any of these:
   Top 10 Viruses, **Top 10 Spam Detections**, **Top 10 Spam Recipients**, **Top 10 Phish Detections**, **Top 10 Unwanted Programs**, **Top 10 Unwanted Content Detections**, **Top 10 Infected Files** or **Detections**.
4. Click **Search**.

Advanced reports

In **Advanced Reports**, you can set filters to narrow your search criteria.

Viewing an advanced report using search filters:

1. Click **Dashboard | Graphical Reports**. The **Graphical Reports** page appears.
2. Click **Advanced tab**.
3. Select at least one filter, you can select up to three of these filters:
   - Subject
   - Recipient

- Reason
- Ticket Number
- Detection Name
- Spam Score

4 Choose **All Dates** or a desired **Date Range** from the drop-down lists.

5 Choose **Bar Graph** or **Pie Chart** as required.

6 If you choose **Pie Chart**, choose to **Query on**, from the drop-down list.

- Recipient
- Sender
- Filename
- Detection Name
- Subject
- Reason
- Rule Name
- Policy Name
- Spam Score

7 In **Maximum Results**, specify the maximum number of segments you want to appear in the pie chart.
For example, if you are interested only in seeing the three most frequently assigned spam scores, type 3.

Query on and **Maximum Results** are available only for pie chart.

8 Click **Search**.

Click **Clear Filter** to return to the default filter values.

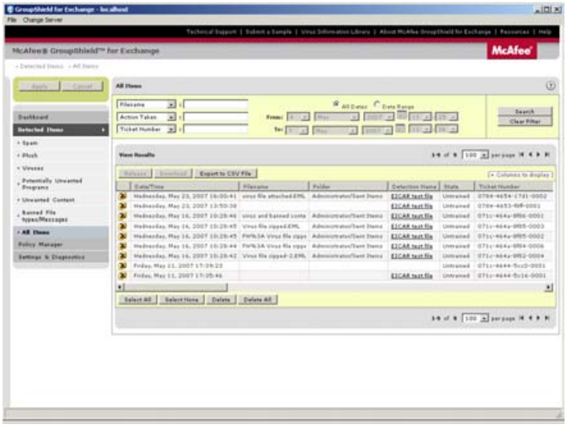
9 Detected Items

Detected Items is used to view information about emails that contains spam, phish, viruses, potentially unwanted programs, unwanted content, banned file types or messages, and all items. You should select at least one search filter, however you can use up to three search filters to narrow your search.

Topics covered are:

- Spam
- Phish
- Viruses
- Potentially Unwanted Programs
- Unwanted Content
- Banned File types/Messages
- All Items

Figure 9-1 Detected Items



GroupShield for Exchange - localhost
File Change Server
Technical Support | Submit a Sample | Virus Information Library | About McAfee GroupShield for Exchange | Resources | Help
McAfee® GroupShield™ for Exchange
McAfee
› Detected Items › All Items
Apply
Cancel
Dashboard
Detected Items
› Spam
› Phish
› Viruses
› Potentially Unwanted Programs
› Unwanted Content
› Banned File types/Messages
› All Items
Policy Manager
Settings & Diagnostics
All Items
Search
Clear Filter
View Results
Release
Download
Export to CSV File
› Columns to display
Select All
Select None
Delete
Delete All

Filename :
Action Taken :
Ticket Number :

● All Dates ○ Date Range

From:
To:

1-9 of 9 | 100 per page

	Date/Time	Filename	Folder	Detection Name	State	Ticket Number
	Wednesday, May 23, 2007 16:30:41	virus file attached.EML	Administrator/Sent Items	EICAR test file	Untrained	0784-4654-1741-0002
	Wednesday, May 23, 2007 13:50:38			EICAR test file	Untrained	0784-4653-f6ff-0001
	Wednesday, May 16, 2007 10:28:46	virus and banned conte	Administrator/Sent Items	EICAR test file	Untrained	071c-464a-8f66-0001
	Wednesday, May 16, 2007 10:28:45	Virus file zipped.EML	Administrator/Sent Items	EICAR test file	Untrained	071c-464a-8f65-0003
	Wednesday, May 16, 2007 10:28:45	FW%3A Virus file zippe	Administrator/Sent Items	EICAR test file	Untrained	071c-464a-8f65-0002
	Wednesday, May 16, 2007 10:28:44	FW%3A Virus file zippe	Administrator/Sent Items	EICAR test file	Untrained	071c-464a-8f64-0006
	Wednesday, May 16, 2007 10:28:42	Virus file zipped-2.EML	Administrator/Sent Items	EICAR test file	Untrained	071c-464a-8f62-0004
	Friday, May 11, 2007 17:39:23				Untrained	071c-4644-5cc0-0001
	Friday, May 11, 2007 17:35:46			EICAR test file	Untrained	071c-4644-5c16-0001

1-9 of 9 | 100 per page

Spam

Spam is an unwanted email message, specifically unsolicited bulk messages.

1. Click **Detected Items | Spam**. The **Spam** page appears.
2. Select up to three of these search filters:
   - Ticket Number
   - Sender
   - Spam Score
   - Action Taken
3. Select **All Dates** to include all the entries. Else, select the desired date and time range from the **Date Range** drop-down lists.
4. Click **Search**. A list of spam items matching your search criteria are displayed in the **View Results** section.

Click **Clear Filter** to return to the default search filter settings.

Phish

Phish is a method of fraudulently obtaining personal information (such as passwords, social security numbers, and credit card details) by sending spoofed email messages that look as though they have come from trusted sources such as legitimate companies or banks.

Typically, phishing email messages request that recipients click on a link in the email to verify or update the contact details or credit card information.

1. Click **Detected Items | Phish**. The **Phish** page appears.
2. Select up to three of these search filters:
   - Ticket Number
   - Sender
   - Spam Score
   - Action Taken

3 Select **All Dates** to include all the entries. Else, select the desired date and time range from the **Date Range** drop-down lists.

4 Click **Search**. A list of phish items matching your search criteria are displayed in the **View Results** section.

ⓘ Click **Clear Filter** to return to the default search filter settings.

Viruses

A virus is a program/code that replicates itself, multiplies, and infects another useful program, boot sector, partition sector or document that supports macros, by inserting itself or attaching itself to that medium. Most viruses replicate, many do a large amount of damage to the system.

1 Click **Detected Items | Viruses**. The **Virus Detections** page appears.

2 Select up to three of these search filters:

- Ticket Number
- Filename
- Action Taken
- Submit to Avert

3 Select **All Dates** to include all the entries. Else, select the desired date and time range from the **Date Range** drop-down lists.

4 Click **Search**. A list of viruses matching your search criteria are displayed in the **View Results** section.

ⓘ Click **Clear Filter** to return to the default search filter settings.

Potentially unwanted programs

Potentially Unwanted Programs (PUPs) are the software programs written by legitimate companies which, if installed, may alter the security state or the privacy posture of a computer.

1. Click **Detected Items | Potentially Unwanted Programs**. The **Potentially Unwanted Programs** page appears.
2. Select up to three of these search filters:
   - Ticket Number
   - Filename
   - Action Taken
   - Submit to Avert
3. Select **All Dates** to include all the entries. Else, select the desired date and time range from the **Date Range** drop-down lists.
4. Click **Search**. A list of PUPs matching your search criteria are displayed in the **View Results** section.

> Click **Clear Filter** to return to the default search filter settings.

Unwanted content

Any content that is filtered by the scanner is called unwanted content. You can use **Unwanted Content** to view emails/attachments that contain unwanted content.

1. Click **Detected Items | Unwanted Content**. The **Unwanted Content** page appears.
2. Select any of these search filters:
   - Ticket Number
   - Filename
   - Action Taken
3. Select **All Dates** to include all the entries. Else, select the desired date and time range from the **Date Range** drop-down lists.
4. Click **Search**. A list of files containing unwanted content are displayed in the **View Results** section.

> Click **Clear Filter** to return to the default search filter settings.

Banned file types/messages

Banned file types are any files which are banned by an administrator.

1 Click **Detected Items | Banned File types/Messages**.

2 Select any of these search filters:

- Ticket Number
- Filename
- Action Taken

3 Select **All Dates** to include all the entries. Else, select the desired date and time range from the **Date Range** drop-down lists.

4 Click **Search**. A list of banned file types/messages matching your search criteria are displayed in the **View Results** section.

Click **Clear Filter** to return to the default search filter settings.

All items

You can use **All Items** to view all emails that contains detected items.

1 Click **Detected Items | All Items**. The **All Items** page appears.

2 Select any of these search filters:

- Ticket Number
- Filename
- Action Taken

3 Select **All Dates** to include all the entries. Else, select the desired date and time range from the **Date Range** drop-down lists.

4 Click **Search**. A list of banned file types/messages matching your search criteria, are displayed in the **View Results** section.

Click **Clear Filter** to return to the default search filter settings.

Search filters used:

- **Action Taken** — to search according to the type of action taken when the item was detected.
- **Filename** — to search by file name.
- **Sender** — to search by the email address of the sender.
- **Spam Score** — to search by the spam score. Spam score is a number that indicates the amount of potential spam contained within an email message.
- **Ticket Number** — to search by ticket number. A ticket number is a 16-digit alpha-numeric entry which is auto-generated by GroupShield for every detection. You can find a ticket number in a notification email. By default, a notification email does not include the ticket number parameter.

Including a ticket number in a notification email:

1. From **Settings & Diagnostics**, click **Notifications**. The **Notifications** page appears.
2. Click **Edit**. The **GroupShield for Exchange - Notification text** dialog box appears.
3. Add **Ticket Number: %tik%**.
4. Click **Save**, then **Apply**.

View results pane

From the **View Results** section of all the detected items, you can:

- Release a quarantined item. Select a record from the **View Results** pane and click **Release**. The original email message is released from the database for delivery to the intended recipient.
- Download a quarantined email message. Select a record from the **View Results** pane and click **Download**.
- Export and save records in .CSV format. Select a record from the **View Results** pane and click **Export to CSV File**.
- Submit a quarantined item to AVERT. Select a record from the **View Results** pane and click **Submit to Avert**.

You can also use:

- **Columns to display** - to select additional column headers to be listed in the **View Results** pane. Click this option, select the desired options, and click **OK**.

> ℹ You must select at least one column header.

- **Select All** — to select all the detected items in the **View Results** pane.
- **Select None** — to deselect all the detected items in the **View Results** pane.
- **Delete** — to delete the selected detected items in the **View Results** pane.
- **Delete All** — to delete all the detected items in the **View Results** pane.

10 Policy Manager

This chapter explains how you enforce policies in GroupShield for Microsoft® Exchange Server 2003/2007. You can use **Policy Manager** to specify policies that determine how different types of threats are treated when detected.

Each type of policy has a master policy, which is the default policy for that policy type. Master policy cannot be deleted, because there should always be one policy from which other policies can be created. The master policy is configured to cover most situations. You can create subpolicies for any exceptional situations that are not covered by the master policy.

You can specify the order in which subpolicies are applied. Subpolicies take priority over the master policy.

Policy manager views

Policy Manager has two views:

- Inheritance View
- Advanced View

Inheritance view

Inheritance View enables you to view policy settings inherited from another policy.

The policy that inherits the settings is known as the “child policy”, and the policy from which it inherits those settings is know as the “parent policy”. If the policy name is indented, that policy inherits some of its settings from its parent policy.

You can use:

- The **Name** of the policy — to edit its settings.
- **Priority** column — to view the order in which policies are applied.
- **Create sub-policy** — to create a subpolicy.
- The **Delete** link — to delete a subpolicy that is no longer required.
- **Enabled** — to enable or disable a subpolicy. If you select this option, the subpolicy is enabled.
- **Apply** — to apply the settings/changes you make.

Advanced view

The main purpose of **Advanced View** is to allow you to change the order in which any subpolicies are applied (in the **Move** column).

You can click on:

- The **Name** of the policy — to edit its settings.
- **Create sub-policy** — to create a subpolicy.

> You can create a subpolicy for exceptions that are not covered by the master policy.

- **Enabled** — to enable or disable a subpolicy. If you select this option, the subpolicy is enabled.
- The **Delete** link — to delete a subpolicy that is no longer needed.
- The **Details** link — to view the description of the policy and its parentage.
- **Apply** — to apply the settings/changes you make.

Creating a subpolicy

1 From **Policy Manager**, select a menu item for which you want to create a subpolicy.

2 Click **Create sub-policy.** The **Create a sub-policy** page appears with three tabs:

- **Initial configuration**
- **Trigger rules**
- **Scanners and filters**

3 In the **Initial configuration** page, type a **sub-policy name** that identifies the policy and what it does.

4 Type a **Description** for the policy, choose a **Parent Policy** for the subpolicy from the drop-down menu, then click **Next**. The **Trigger rules** page appears.

5 Specify the conditions when the policy should be triggered. Select **Any of the rules apply**, **All rules apply** or **None of the rules apply** for a specific user.

6 Click **New Rule**. From the **Specify a policy rule** section, choose one of these primary rules and specify an appropriate secondary rule:

- **The SMTP address of the sender is e-mail address**
- **The SMTP address of the sender is not e-mail address**
- **The SMTP address of any recipients is e-mail address**
- **The SMTP address of any recipients is not e-mail address**
- **The sender is in Active Directory Group**
- **The sender is not in Active Directory Group**
- **Any of the recipients is in Active Directory Group**
- **Any of the recipients is not in Active Directory Group**

7 Click **Add** to select the trigger rule.

> If you do not wish to perform step 9 and 10, you can **Copy rules from another policy** by selecting it from the drop-down menu.

8 Click **Next.** The **Scanners and filters** page appears.

9 In the **Policy scanners and Filters initialization page**, choose one of these:

- **Inherit all settings from the parent policy** to inherit all the properties of the Master policy.

- **Initialize selected settings with values copied from another policy** to choose a policy from the drop-down and initialize the selected settings with the values of that policy.

10 Click **Finish**, then **Apply**.

Policy settings

You can set up policies that determine how different types of threats are treated for different groups of users or databases stored on the server. Each policy specifies the settings and actions that are used by the policy and the actions taken when a detection is triggered in the Exchange environment. The settings are given names and can be used by many policies at the same time. However the actions are specific to a particular policy.

1. From **Policy Manager**, select a menu item.
2. Click on a policy of a desired submenu item for which you want to configure settings and actions. The policy page appears with three tabs namely **List All Scanners**, **View Settings**, and **Specify Users**.

List all scanners

In the **List All Scanners** tab, you can configure different types of policy settings. The type of settings that are available depend on which scanner/filter is selected. You can use:

- **Policy** — to select a policy (from the drop-down) that you want to configure.
- **Add Scanner/Filter** — to configure the policy so that it only applies at specific times. For example, you can create anti-virus settings that is applicable only on weekends.

> For more information on **Add Scanner/Filter**, refer to *Adding scanner/filter on page 110*.

- **Core Scanners** — to configure the policy for each type of scanner. Typical core scanners include:
  - Anti-Virus Scanner
  - Content Scanning
  - File Filtering
  - Anti-Spam (Gateway)

- Anti-Phishing (Gateway)

For more information on **Core Scanners** mentioned above, see *Scanners and filters on page 113*

- **Filters** — to configure the policy for each type of filter. Typical filters include:
  - Corrupt Content
  - Protected Content
  - Encrypted Content
  - Signed Content
  - Password-Protected Files
  - Scanner Control
  - MIME Mail Settings
  - HTML Files
  - Mail Size Filtering (Gateway)

For more information on **Filters** mentioned above, see *Filters on page 135*.

- **Miscellaneous** — to configure the alert messages for this policy. Miscellaneous settings include:
  - Alert Settings
  - Disclaimer Text (Gateway)

For more information on the **Miscellaneous** settings, see *Miscellaneous on page 153*.

Adding scanner/filter

1. From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.
2. Choose a desired policy from the drop-down list.
3. Click **Add Scanner/Filter**. The **Create time-constrained configuration** page appears.
4. Specify the required scanner/filter category from the drop-down list.
5. Under **When to use this instance**, specify whether you want to use an existing time slot or create a new one for this time-constrained policy.

6 If you choose **Select existing time slot**, choose any one of these from the drop-down menu:

- **Weekdays**
- **Weekends**
- **Working hours**

7 If you choose **Create a new time slot**, specify a name for the new time slot and select the desired day(s) and time.

8 Click **Save**, then **Apply**.

You can delete a new time slot that you have created.

View settings

In the **View Settings** tab, you can configure scanner/filter settings for a selected policy and the scanner/filter that you choose. You can:

- View and configure option settings, including specifying which alert message to use when a detection triggers a content rule.
- View and configure content rules and actions.
- View and configure the desired action to take place in case of a detection.

The **View Settings** tab displays a summary of the key settings for the selected policy and scanners/filters and allows you to change those settings.
For example, you can enable or disable the policy, and change the alert message associated with that policy.

Specify users

Using the **Specify Users** tab, you can specify policy rules that apply to specific users.

Creating a new rule for a specific user

1 In the **Specify who this policy applies to** pane, specify the conditions where the policy will trigger.
Select **Any of the rules apply**, **All rules apply** or **None of the rules apply** for the specific user.

2 Click **New Rule**.

3 In the **Specify a policy rule** pane, select the policy rule, and then specify the condition for the rule. You can select from these policy rule templates:

- **The SMTP address of the sender is e-mail address**
- **The SMTP address of the sender is not e-mail address**
- **The SMTP address of any recipients is e-mail address**
- **The SMTP address of any recipients is not e-mail address**
- **The sender is in Active Directory Group**
- **The sender is not in Active Directory Group**
- **Any of the recipients is in Active Directory Group**
- **Any of the recipients is not in Active Directory Group**

4 Click **Add** to select the trigger rule.

> If you do not wish to perform step 3 and 4, you can **Copy rules from another policy** by selecting it from the drop-down menu.

5 Click **Apply**.

Scanners and filters

Policy Manager has core scanners, filters and miscellaneous settings for different types of policies (submenu items). The different scanning types in GroupShield for Exchange are:

- **On-Access** — to create policies for email messages every time they are opened, copied or saved to determine if they contain a virus or other potentially unwanted code. On-access scanning is also called real-time scanning.
- **On-Demand (Default)** — to create policies that are activated at set intervals or on demand, to find a virus or other potentially unwanted code.
- **On-Demand (Find Viruses)** — to create policies that are activated at set intervals or on demand, to find a virus or other Potentially Unwanted Programs (PUPs) and other possible threats.
- **On-Demand (Remove Viruses)** — to create policies that are activated at set intervals or on demand, and which remove viruses, Potentially Unwanted Programs (PUPs) and other possible threats.
- **On-Demand (Find Banned Content)** — to create policies that are activated at set intervals or on demand, to find a banned content that you do not want to appear in email messages.
- **On-Demand (Remove Banned Content)** — to create policies that are activated at set intervals or on demand, and which remove content that you do not want to appear in email messages. For example, if an email message contains a particular word or phrase, you can set up a policy to automatically replace the content of that email message with an alert message. You can use this type of policy to prevent unwanted information entering or leaving your organization.
- **On-Demand (Full Scan)** — to create policies that are activated at set intervals or on demand.
- **Gateway** — to create policies for email messages every time they are opened, copied or saved to determine if it is a spam, phish, MIME files or HTML files.

The core scanners, filters, and miscellaneous settings for each type of policy are explained in detail below.

Core scanners

Core scanners in GroupShield 7.0 include:

- Anti-Virus Scanner
- Content Scanning
- File Filtering
- Anti-Spam
- Anti-Phishing

Anti-virus scanner

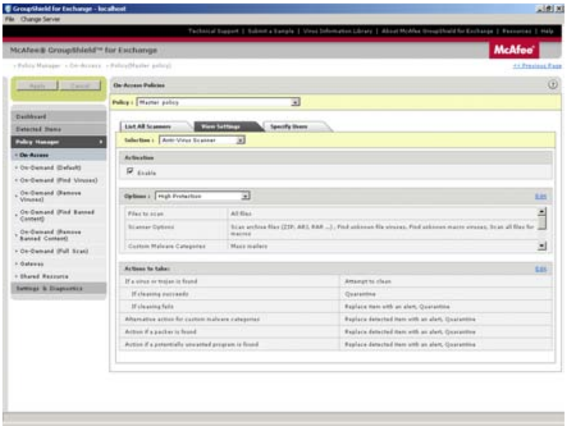
Anti-Virus Scanner consists of computer programs that attempt to identify, thwart and eliminate computer viruses and other malicious software.

1 From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.

2 Select a desired **Policy** from the drop-down menu.

3 Click **Anti-Virus Scanner**. The **View Settings** tab for the anti-virus scanner appears.

Figure 10-1 Anti-Virus Scanner


GroupShield for Exchange - localhost
File Change Server
Technical Support | Submit a Sample | Virus Information Library | About McAfee GroupShield for Exchange | Resources | Help
McAfee® GroupShield™ for Exchange
McAfee
› Policy Manager › On-Access › Policy(Master policy)
<< Previous Page
Apply
Cancel
Dashboard
Detected Items
Policy Manager
On-Access
On-Demand (Default)
On-Demand (Find Viruses)
On-Demand (Remove Viruses)
On-Demand (Find Banned Content)
On-Demand (Remove Banned Content)
On-Demand (Full Scan)
Gateway
Shared Resource
Settings & Diagnostics
On-Access Policies
List All Scanners
View Settings
Specify Items
Edit
Edit

Policy : Master policy

Selection : Anti-Virus Scanner

Activation

☑ Enable

Options : High Protection

Files to scan	All files
Scanner Options	Scan archive files (ZIP, ARJ, RAR ...), Find unknown file viruses, Find unknown macro viruses, Scan all files for macros
Custom Malware Categories	Mass mailers

Actions to take:

If a virus or trojan is found	Attempt to clean
If cleaning succeeds	Quarantine
If cleaning fails	Replace item with an alert, Quarantine
Alternative action for custom malware categories	Replace detected item with an alert, Quarantine
Action if a packer is found	Replace detected item with an alert, Quarantine
Action if a potentially unwanted program is found	Replace detected item with an alert, Quarantine

4 In **Activation**, select or deselect **Enable** to enable or disable the anti-virus scanner settings for this policy.

5 In **Options**, select any one of these anti-virus option set that you want to view or configure:

- **High Protection** — to view and configure the settings that are applied when a high level of protection is required.
- **Medium Protection** — to view and configure the settings that are applied when a medium level of protection is required.
- **Low Protection** — to view and configure the settings that are applied when a low level of protection is required.
- **create new set of options** — to create a new set of options for the selected policy.

> For step-by-step instructions to **create new set of options**, refer to *Creating new set of options for Anti-Virus Scanner on page 115*.

6 Click the **Edit** link under **Options** to edit the selected option set.

7 In **Actions to take**, view/edit a summary of the actions that will be taken in different circumstances. To change those actions, click **Edit**.

> For information editing anti-virus scanner actions, refer to *Editing anti-virus scanner actions on page 118*

Creating new set of options for Anti-Virus Scanner

1 From **Policy Manager**, select a submenu item that has anti-virus scanner. The policy page for the submenu item appears.

2 Choose a desired policy from the drop-down.

3 Click **Anti-Virus Scanner**. The **View Settings** tab for the anti-virus scanner appears.

4 In the **Options** drop-down menu, click **create new set of options**. The **Anti-Virus Scanner Settings** page appears, which has four tabs:

- **Basic Options**
- **Advanced**
- **Packers**
- **PUPs**

5 In **Basic Options** tab, under **Specify which files to scan**, select one of these options:

- **Scan all files** — to specify that all the files should be scanned, regardless of their type.

- **Default file types** — to specify that only the default file types should be scanned.
- **Defined file types** — to specify which file types should be scanned.

6 Under **Scanner options**, select the scanner options you require. You can select:

- **Scan archive files (ZIP, ARJ, RAR...)** — to scan inside archive files, such as ZIP files.
- **Find unknown file viruses** — to use heuristic analysis techniques to search for unknown viruses.
- **Find unknown macro viruses** — to find unknown viruses in macros.
- **Scan all files for macros** — to scan all files for macros.
- **Find all macros and treat as infected** — to find macros in files and treat them as infected items.
- **Remove all macros from document files** — to remove all macros from the document files.

7 In **Advanced** tab, under **Custom malware categories**, specify which items should be treated as malware. There are two ways to select malware types:

- Select the malware types from the list of checkboxes below **Custom malware categories**.
- Select **Specific detection names** and click **Add**.

When typing in a name, you can use wildcards for pattern matching.

8 Select or deselect the option **Do not perform custom malware check if the object has already been cleaned** to specify, if items that have already been cleaned successfully should be subject to the custom malware check or not.

9 Under **Clean options**, specify what happens to files that are reduced to zero bytes after being cleaned. Select any one of these options:

- **Keep zero byte file** — to keep files that have been cleaned and is of zero bytes.
- **Remove zero byte file** — to remove any file that has zero bytes after being cleaned.
- **Treat as a failure to clean** — to treat zero byte files as if they cannot be cleaned, and apply the failure to clean action.

10 In **Packers**, use:

- **Enable detection** — to enable or disable the detection of packers.

- Exclude specified names — to specify which packers can be ignored.
- Include only specified names — to specify which packers you want the software to detect.
- Add — to add packer names to a list.
- Delete — to remove packer names from a list.

11 In PUPs, use:

Enable detection — to enable or disable the detection of PUPs. Click on the this disclaimer link and read the disclaimer before configuring PUP detection.

Select the program types to detect — to specify whether each type of PUP listed below should be detected or ignored:

- Spyware
- Adware
- Remote administration tools
- Dialers
- Password crackers
- Joke programs
- Cookies
- Other PUPs not included in the above categories.

Exclude specified names — to list by name the PUPs that you want the software to ignore. For example, if you have enabled spyware detection, you can create a list of spyware programs that you want the software to ignore.

Include only specified names — to list by name the PUPs that you want the software to detect. For example, if you enable spyware detection, and specify that only named spyware programs should be detected, all other spyware programs are ignored.

Add — to add PUP names to a list. You can use wildcards to match names.

Delete — to delete the PUP names that you have added.

The McAfee website http://vil.nai.com/vil/default.aspx contains a list of PUP names. Use the Search in Category option to select Potentially Unwanted Programs.

12 Click Save, then Apply.

Editing anti-virus scanner actions

1 From **Policy Manager**, select a submenu item that has anti-virus scanner. The policy page for the submenu item appears.

2 Choose a desired policy.

3 Click **Anti-Virus Scanner**. The **View Settings** tab for the anti-virus scanner appears.

4 Under **Actions to take** section, click the **Edit** link. The **Anti-Virus Scanner Actions** page appears.

5 In **Cleaning** tab, under **Virus and trojans cleaning**, select the option **Attempt to clean any detected virus or trojan** to enable the cleaning of any virus or trojan.

6 Under **If cleaning succeeds, take the following action**, select the desired option(s) if the cleaning succeeds:

- **Log** — to record the detection in a log.
- **Quarantine** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.
- **Notify sender** — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.
- **Notify recipient** — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

7 In the remaining tabs (**Default Actions**, **Custom Malware**, **Packers**, and **PUPs**), choose a primary action from the drop-down list and select one or more secondary actions.

In the **Custom Malware** tab, you can also see the custom malware categories that you have selected while creating a new set of anti-virus scanner options (**Advanced** tab)

Primary and secondary anti-virus scanner actions

Primary actions for **On-Access** scan include:

- **Replace detected item with an alert** — to replace the detected item with an alert message.
- **Delete embedded item** — to delete the detected item. For example, to delete an attachment that triggers a detection rule.
- **Delete message** — to delete the email message item.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Primary actions for On-Demand (Default), On-Demand (Find Viruses), On-Demand (Remove Viruses), and On-Demand (Full Scan) scan include:

- Replace detected item with an alert — to replace the detected item with an alert message.
- Delete message — to delete the email message item.
- Allow through — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions for On-Access and On-Demand (Default) scan include:

- Log — to record the detection in a log.
- Quarantine — to take a copy of the item and store it in the quarantine database.
- Notify administrator — to send an alert message to the email administrator.
- Notify sender — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.
- Notify recipient — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

Secondary actions for On-Demand (Find Viruses), On-Demand (Remove Viruses), and On-Demand (Full Scan) scan include:

- Log — to record the detection in a log.
- Quarantine — to take a copy of the item and store it in the quarantine database.
- Notify administrator — to send an alert message to the email administrator.

Content scanning

GroupShield can identify the textual data in a mail/attachment for scanning. You can create content rules to specify banned content and assign them to the policies.

1. From Policy Manager, select a submenu item that has the content scanner. The policy page for the submenu item appears.
2. Choose a desired policy from the drop-down list.

3 Click **Content Scanning**. The **View Settings** tab for the content scanner appears.

4 In **Activation**, select or deselect **Enable** to enable or disable the content scanner settings for this policy.

5 In **Options**, select:

- **Include document and database formats in content scanning**
- **Scan the text of all attachments**

6 Under **When content is replaced due to a rule being triggered, use the following alert**, select an existing alert from the drop-down or click **Create** to create a new alert.

> For step-by-step instructions about creating a new alert, refer to *Creating a new alert on page 120*.

If the alert text is not shown and you would like to preview it, click **View/Hide** to display the text. If the alert text is displayed, click **View/Hide** to hide it.

> You cannot customize the default alert messages because they are read-only.

7 In **Content Scanner rules and associated actions**, click:

- **Add rule** — to create a new content rule for this policy.

> For step-by-step instructions on creating a new content rule, refer to *Adding a new content rule on page 122*.

- **Edit** — to change the action associated with a content rule.
- **Delete** — to delete a content rule.

Creating a new alert

1 From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.

2 Select a desired policy.

3 Click **Content Scanning**. The **View Settings** tab for the content scanner appears.

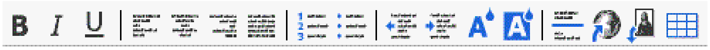
4 Under **Options**, click **Create**. The **Alert Editor** page appears.

5 Type a meaningful **Alert name**.

6 Under **Content Scanning Alert**, choose the desired **Style**, **Font**, **Size**, and **Tokens** from the respective drop-down lists.

> These options are available only if you choose **HTML content (WYSIWYG)** from the **Show** drop-down menu.

7 Choose any of these tools available in **Content Scanning Alert**.



- **Bold** — to make the selected text bold.
- **Italic** — to make the selected text italic.
- **Underline** — to underline the selected text.
- **Align Left** — to left align the selected paragraph.
- **Center** — to center the selected paragraph.
- **Align Right** — to right align the selected paragraph.
- **Justify** — to adjust the selected paragraph so that the lines within the paragraph fill a given width, with straight left and right edges.
- **Ordered List** — to make the selected text into a numbered list.
- **Unordered List** — to make the selected text into a bulleted list.
- **Outdent** — to move the selected text a set distance to the right.
- **Indent** — to move the selected text a set distance to the left.
- **Text Color** — to change the color of the selected text.
- **Background Color** — change the background color of the selected text.
- **Horizontal Rule** — to insert a horizontal line.
- **Insert Link** — to insert a hyperlink where the cursor is currently positioned. In **URL**, type the URL. In **Text**, type the name of the hyperlink as you want it to appear in the alert message. If you want the link to open a new window, select **Open link in new window**, then click **Insert Link**.
- **Insert Image** — to insert an image where the cursor is currently positioned. In **Image URL**, type the location of the image. In **Alternative text**, type the text you want to use in place of the image when images are suppressed or the alert message is displayed in a text-only browser. If you want to give the image a title, type the title name in **Use this text as the image title**. Click **Insert Image**.

- **Insert Table** — to insert a table at the current cursor position. Type the values in **Rows**, **Columns**, **Table width**, **Border thickness**, **Cell padding**, and **Cell spacing** to configure the table, then click **Insert Table**.

8 From the **Show** drop-down menu, specify how the alert message should be displayed within the user interface. You can select:

- **HTML content (WYSIWYG)** — to hide the underlying HTML code and display only the content of the alert message.
- **HTML content (source)** — to display the HTML code as it appears before compilation.
- **Plain-text content** — to display the content as plain text.

9 Click **Save**, then **Apply**.

> Click **Reset** to undo all changes you have made since you last saved the alert message.

Adding a new content rule

1 From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.

2 Choose a desired policy.

3 Click **Content Scanning**. The **View Settings** tab for the content scanner appears.

4 Under **Content Scanner rules and associated actions**, click **Add rule**. The **Content Rules** page appears.

5 Under **Specify actions for a selection of content rules**:

- Select a rule group from the **Select rules group** drop-down menu that will trigger an action if one or more of its rules are broken.
- In **Select rules from this group**, specify if all rules or only rules with a specific severity rating should be included. The options are **Severity - Low**, **Severity - Medium**, and **Severity - High**.

> Selecting the **Select all** option overrides all the three rules.

6 Under **If detected, take the following action**, choose the desired primary and secondary content scanner actions.

> See *Primary and secondary content scanner actions on page 123*.

7 Click **Save**, then **Apply**.

Primary and secondary content scanner actions

Primary actions for **On-Access** scan include:

- **Replace item with an alert** — to replace the detected item with an alert message.
- **Delete embedded item** — to delete the detected item. For example, to delete an attachment that triggers a detection rule.
- **Delete message** — to delete the email message item.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Primary actions for **On-Demand (Default)**, **On-Demand (Find Banned Content)**, **On-Demand (Remove Banned Content)**, and **On-Demand (Full Scan)** scan include:

- **Replace detected item with an alert** — to replace the detected item with an alert message.
- **Delete message** — to delete the email message item.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions for **On-Access** and **On-Demand (Default)** scan include:

- **Log** — to record the detection in a log.
- **Quarantine** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.
- **Notify sender** — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.

- **Notify recipient** — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

Secondary actions for **On-Demand (Find Banned Content)**, **On-Demand (Remove Banned Content)**, and **On-Demand (Full Scan)** scan include:

- **Log** — to record the detection in a log.
- **Quarantine** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.

File filtering

You can configure the file filtering settings for a selected policy.

1. From **Policy Manager**, select a submenu item that has a file filter. The policy page for the submenu item appears.
2. Choose a desired policy.
3. Click **File Filtering**. The **View Settings** tab for the file filtering scanner appears.
4. In **Activation**, select or deselect **Enable** to enable or disable the file filtering scanner settings for the policy.
5. In **Alert selection**, specify which alert will be used when an infected mail triggers a file filtering rule. You can also select an existing alert or use **Create** to create a new alert.

   For step-by-step instructions on creating a new alert, refer to *Creating a new alert on page 120*.

   If the alert text is not shown and you would like to preview it, click **View/Hide** to display the text. If the alert text is displayed, click **View/Hide** to hide it.
6. From **File filtering rules and associated actions**, use:
   - **Available rules** — to select an existing file filtering rule or create new file filtering rules for the policy.
     To create a new file filtering rule, select **Create new rule**. The **File Filtering Rule** page appears. You can use the file filtering rules to monitor and restrict the movement of files. You can even filter files according to their file name, category type, and size.

   For more information about **Create a new rule**, refer to *Creating a new file filtering rule on page 125*.

- **Change** — to change the primary and secondary actions associated with a file filtering rule.

> For more information on changing the primary and secondary actions associated with a file filtering rule, refer to *Primary and secondary file filtering actions on page 127*

- **Delete** — to delete the file filtering rule.

Creating a new file filtering rule

1. From **Policy Manager**, select a submenu item that has a file filter. The policy page for the submenu item appears.
2. Choose a desired policy.
3. Click **File Filtering**. The **View Settings** tab for the file filtering scanner appears.
4. From the **Available rules** drop-down menu under **File filtering rules and associated actions**, choose **Create new rule**. The **File Filtering Rule** page appears.
5. Enter a unique **Rule name**. Give the rule, a meaningful name, so that you can easily identify it and what it does.
   For example, FilesOver5MB.
6. In **Filename filtering**, select **Enable file name filtering** to enable file filtering according to the file names.
   For example, if you type *.exe, this file filtering rule is applied to any file that has a .exe file name extension.
7. In **Take action when the file name matches**, specify the names of the files that are affected by this rule.
   You can use the * and ? wildcard characters to match multiple filenames. For example, if you want to filter out executable files, type *.exe.
8. Click **Add** to add the file names to the filtering list or **Delete** to remove file names from the filtering list.
9. In **File category filtering**, select **Enable file category filtering** to enable file filtering according to their file type.
10. In **Take action when the file category is**, specify the type of files that are affected by this rule.

> File types are divided into categories and subcategories.

11 In **File categories**, click on a file type. An asterisk symbol (*) appears next to the file type to indicate that the selected file type will be filtered.

12 In **Subcategories**, click on the subcategory you want to filter.

> To select more than one subcategory, use Ctrl+Click or Shift+Click.
> To select all of the subcategories, click **All**.

> Click **Clear selections** to undo the last selection. Click on a desired **File category** you have chosen (where the asterisk appears) and click **Clear Selections** to deselect it.

13 Select **Extend this rule to unrecognized file categories** to apply this rule to any other file categories and subcategories that are not specifically mentioned in the categories and subcategories lists.

14 In **File size filtering**, select **Enable file size filtering** to filter files according to their file size.

15 In **Take action when the file size is**, choose **Greater than** to specify that the action should only be applied if the file is larger than the size specified.

16 Choose **Less Than** to specify that the action should only be applied if the file is smaller than the size specified.

17 Click **Save**, then **Apply**.

Primary and secondary file filtering actions

Primary actions for On-Access scan include:

- Replace detected item with an alert — to replace the detected item with an alert message.
- Delete embedded item — to delete the detected item. For example, to delete an attachment that triggers a detection rule.
- Delete message — to delete the email message item.
- Allow through — to allow the item to continue to the next scanning phase or on to its final destination.

Primary actions for On-Demand (Default), and On-Demand (Full Scan) scan include:

- Replace detected item with an alert — to replace the detected item with an alert message.
- Delete message — to delete the email message item.
- Allow through — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions for On-Access and On-Demand (Default) scan include:

- Log — to record the detection in a log.
- Quarantine — to take a copy of the item and store it in the quarantine database.
- Notify administrator — to send an alert message to the email administrator.
- Notify sender — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.
- Notify recipient — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

Secondary actions for On-Demand (Full Scan) scan include:

- Log — to record the detection in a log.
- Quarantine — to take a copy of the item and store it in the quarantine database.

- **Notify administrator** — to send an alert message to the email administrator.

Anti-spam

You can configure the file filtering settings for a selected policy.

1. From **Policy Manager**, select **Gateway**. The policy page for **Gateway** appears.
2. Choose a desired policy.
3. Click **Anti-Spam**. The **View Settings** tab for the anti-spam scanner appears.
4. In **Activation**, select or deselect **Enable** to enable or disable the anti-spam settings for the policy.
5. In **Options**, select one of these:
   - **Core Anti-Spam Settings** — to view and configure the default anti-spam settings.
   - **create new set of options** — to create a new set of anti-spam setting options for a selected policy.

     For more information, refer to *Creating new set of options for anti-spam settings on page 129*.

   - **Edit** — to change the anti-spam setting options associated with a policy.
6. In **Actions to take if spam is detected**, click **Edit**. The **Anti-Spam Action** page appears with three tabs:
   - **High Score**
   - **Medium Score**
   - **Low Score**
7. Based on the spam score (**High**, **Medium** or **Low**), choose the desired primary and secondary actions in all the tabs.

   Anti-spam scanner is applicable only to inbound email messages.

Primary and secondary filtering actions for anti-spam

Primary actions for **Gateway** scan (for high, medium, and low spam score) include:

- **Route to System Junk Folder** — to route the email messages to the system junk folder.
- **Route to User Junk Folder** — to route the email messages to the user junk folder.

- **Reject the Message** — to reject the email message.
- **Delete message** — to delete the email message item.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions for **Gateway** scan (for high, medium, and low spam score) include:

- **Log** — to record the detection in a log.
- **Quarantine message** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.

Creating new set of options for anti-spam settings

1. From **Policy Manager**, select **Gateway**. The policy page for the **Gateway** submenu item appears.
2. Choose a desired policy from the drop-down.
3. Click **Anti-Spam**. The **View Settings** tab for the anti-spam scanner appears.
4. In **Instance name**, specify a name for the anti-spam settings. This field is mandatory.
5. In the **Options** drop-down menu, click **create new set of options**. The **Anti-Spam Settings** page appears, with four tabs:
   - **Options**
   - **Advanced**
   - **Mail Lists**
   - **Rules**
6. In the **Options** tab, under **Scoring**, type the values for:
   - **High score threshold** — if the overall spam score is 15 or more.
   - **Medium score threshold** — if the overall spam score is 10 or more, but less than 15.
   - **Low score threshold** — if the overall spam score is 5 or more, but less than 10.

> To use the default values of spam scores, select the **Use default** option.

> These default settings have been carefully optimized to maintain the balance between a high spam detection rate and a low false positive rate. In the unlikely event that you need to change these settings, there is a technical notice available from Technical Support.

7 In **Reporting**, under the **Spam reporting threshold is** drop-down menu, select **High**, **Medium**, **Low** or **Custom** to specify the point at which an email message should be marked as spam.

8 In **Custom score**, enter a specific spam score at which email messages should be marked as spam. This field is enabled only if you select the **Custom** option in step 6.

9 Select or deselect the **Add prefix to subject of spam messages** option as desired.

10 From the **Add a spam score indicator** drop-down menu, choose one of these:

- **Never** - not to add a spam score indicator to the Internet header of any email message.
- **To spam messages only** — to add a spam score indicator to the Internet header of spam email messages only.
- **To non-spam messages only** — to add a spam score indicator to the Internet header of non-spam email messages only.
- **To all messages** — to add a spam score indicator to the Internet header of all email messages.

> Spam score indicator is a symbol used in the spam report, that is added to the email message's Internet headers, to indicate the amount of potential spam contained in an email message.

11 From the **Attach a spam report** drop-down menu, choose one of these:

- **Never** - not to add a spam report to any of the email messages.
- **To spam messages only** — to add a spam report to spam email messages only.
- **To non-spam messages only** — to add a spam report to non-spam email messages only.
- **To all messages** — to add a spam report to all email messages.

12 Select or deselect **Verbose reporting** to specify whether verbose reporting is required or not.
Verbose reporting includes the names and descriptions of the anti-spam rules that have been triggered.

> **Verbose reporting** is available only if you do not choose **Never** in step 10.

13 In the **Advanced** tab, use:

- **Maximum message size to scan (KB)** — to specify the maximum size (in kilobytes) that an email message can be scanned. You can enter a size up to 999,999,999 kilobytes, although typical spam email messages are quite small. Default value is 250.

- **Maximum width of spam headers (Bytes)** — to specify the maximum size (in bytes) that the spam email message header can be. The minimum header width that you can specify is 40 characters and the maximum is 999 characters. Default value is 76.

> Spammers often add extra information to headers for their own purposes.

- **Maximum number of reported rules** — to specify the maximum number of anti-spam rules that can be included in a spam report. The minimum number of rules you can specify is 1 and the maximum is 999. Default value is 180.

- **Header name** — to specify a different name for the email header. You can use this email header and its header value (below) when tracking email messages and applying rules to those messages. These fields are optional, and accept up to 40 characters.

- **Header value** — to specify a different header value for the email header.

- **Add header** — to specify that the header should be added to none of the email messages, all of the email messages, only spam email messages or only to non-spam email messages.

- Select or deselect the **Use alternative header names when a mail is not spam** option as required.

- Select a required **Spam profile** from the drop-down.

> A spam profile is a set of characteristics that identify a category of spam. To enable the anti-spam software to better detect spam, users can submit examples of spam, which enables the software to learn to recognize further spam. The anti-spam software builds a spam profile - a view of what the users regard as spam.

14 In the **Mail Lists** tab, under **Blacklists** and **Whitelists**, enter the email addresses of the blacklisted and whitelisted senders and recipients.
Email messages sent to or from an email address on a blacklist are treated as spam, even if they do not contain spam-like characteristics.
Email messages sent to or from email addresses on a whitelist are not treated as spam, even if they contain spam-like characteristics.

> Click **Add** to add email addresses to a list and the checkbox beside each address to specify whether it is currently enabled or not. Click **Delete** to remove an email address from the list.
>
> You cannot add the same email address more than once.

15 In **Rules** tab, click the **Edit** link of a rule to enable or disable it and to change its spam score. Then click the Save link of that corresponding rule.

> Click **Reset** to return to the default anti-spam settings.

16 Click **Save**, then **Apply**.

Anti-phishing

You can configure the anti-phish settings for a selected policy.

1 From **Policy Manager**, select **Gateway**. The policy page for **Gateway** appears.

2 Choose a desired policy.

3 Click **Anti-Phishing**. The **View Settings** tab for the anti-phish appears.

4 In **Activation**, select or deselect **Enable** to enable or disable the anti-phishing settings for the policy.

5 In the **Options** drop-down menu, select one of these:

- **Core Anti-Phishing Settings** — to view and configure the default anti-phishing settings.

- **create new set of options** — to create a new set of options for anti-phising setting of a selected policy.

For more information, refer to *Creating new set of options for anti-phishing settings on page 133*

- **Edit** — to change the anti-phishing setting options associated with a policy.

6 In **Actions**, click **Edit**. The **Anti-Phishing Actions** page appears.

7 Choose the desired primary and secondary actions.

Anti-phish scanner is applicable only to inbound email messages.

Primary and secondary filtering actions for anti-phish

Primary actions for **Gateway** scan (for high, medium, and low spam score) include:

- **Reject the Message** — to reject the email message.
- **Delete message** — to delete the email message item.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions for **Gateway** scan (for high, medium, and low spam score) include:

- **Log** — to record the detection in a log.
- **Quarantine message** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.

Creating new set of options for anti-phishing settings

1 From **Policy Manager**, select **Gateway**. The policy page for the **Gateway** submenu item appears.

2 Choose a desired policy from the drop-down.

3 Click **Anti-Phishing**. The **View Settings** tab for the anti-phishing scanner appears.

4 In the **Options** drop-down menu, click **create new set of options**. The **Anti-Phishing Settings** page appears.

5 In **Instance name**, specify a name for the anti-phishing settings. This field is mandatory.

6 In **Reporting** options, select or deselect these options as required:

- **Add prefix to subject of phishing messages** — to specify that you want to add text to the start of the subject line of any email message that probably contains phish.
- **Add a phish indicator header to messages** — to specify whether a phish indicator is added to the Internet header of any email message that probably contains phish.
- **Attach a phish report** — to specify whether a phish report should be generated and added to an email message.
- **Verbose reporting** — to specify whether the names and a detailed description of the anti-phish rules that have been triggered should be included in the email message. This option is available only if the **Attach a phish report** option is selected.

7 Click **Save**, then **Apply**.

Filters

Filters in GroupShield 7.0 include:

- Corrupt Content
- Protected Content
- Encrypted Content
- Signed Content
- Password-Protected Files
- Scanner Control
- MIME Mail Settings
- HTML Files
- Mail Size Filtering

Corrupt content

The content in some mails can be corrupt, which means such content cannot be scanned. Corrupt Content policy specifies how the mails with corrupt content are handled when detected.

1. From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.
2. Choose a desired policy.
3. Click **Corrupt Content**. The **View Settings** tab for the corrupt content filter appears.
4. In **Activation**, select or deselect **Enable** to enable or disable the corrupt content filter settings for the policy.
5. In **Actions**, view the action that will be taken when corrupt content is detected. To change those actions, click the **Edit** link.

For information on editing the actions that will be taken when corrupt content is detected, refer to *Primary and secondary filtering actions for corrupt content on page 136*.

Primary and secondary filtering actions for corrupt content

Primary actions for On-Access scan include:

- Replace detected item with an alert — to replace the detected item with an alert message.
- Delete embedded item — to delete the detected item. For example, to delete an attachment that triggers a detection rule.
- Delete message — to delete the email message item.
- Allow through — to allow the item to continue to the next scanning phase or on to its final destination.

Primary actions for On-Demand (Default), and On-Demand (Full Scan) scan include:

- Replace detected item with an alert — to replace the detected item with an alert message.
- Delete message — to delete the email message item.
- Allow through — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions for On-Access and On-Demand (Full Scan) scan include:

- Log — to record the detection in a log.
- Quarantine — to take a copy of the item and store it in the quarantine database.
- Notify administrator — to send an alert message to the email administrator.

Secondary actions for On-Demand (Default) scan include:

- Log — to record the detection in a log.
- Quarantine — to take a copy of the item and store it in the quarantine database.
- Notify administrator — to send an alert message to the email administrator.
- Notify sender — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.

- **Notify recipient** — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

Protected content

The content of some mails can be protected, which means that content cannot be scanned. For example, password-protected MS Office files. Protected Content policy specifies how the mails with protected content are handled when detected.

1. From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.
2. Choose a desired policy.
3. Click **Protected Content**. The **View Settings** tab for the protected content filter appears.
4. In **Activation**, select or deselect **Enable** to enable or disable the protected content filter settings for the policy.
5. In **Actions**, view the action that will be taken when protected content is detected. To change those actions, click the **Edit** link.

> For more information on editing the actions that will be taken when a protected content is detected, refer to *Primary and secondary filtering actions for protected content on page 137*.

Primary and secondary filtering actions for protected content

Primary actions for **On-Access** scan include:

- **Replace detected item with an alert** — to replace the detected item with an alert message.
- **Delete embedded item** — to delete the detected item. For example, to delete an attachment that triggers a detection rule.
- **Delete message** — to delete the email message item.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Primary actions for **On-Demand (Default)**, **On-Demand (Find Banned Content)**, **On-Demand (Remove Banned Content)**, and **On-Demand (Full Scan)** scan include:

- **Replace detected item with an alert** — to replace the detected item with an alert message.

- **Delete message** — to delete the email message item.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions for **On-Access**, **On-Demand (Find Banned Content)**, **On-Demand (Remove Banned Content)** scan include:

- **Log** — to record the detection in a log.
- **Quarantine** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.

Secondary actions for **On-Demand (Default)** scan include:

- **Log** — to record the detection in a log.
- **Quarantine** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.
- **Notify sender** — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.
- **Notify recipient** — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

Encrypted content

Some email messages can be encrypted, which means such content cannot be scanned. For example, any file encrypted with a key. Encrypted Content policy specifies how the emails with protected content are handled when detected.

1. From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.
2. Choose a desired policy.
3. Click **Encrypted Content**. The **View Settings** tab for the protected content filter appears.
4. In **Activation**, select or deselect **Enable** to enable or disable the encrypted content filter settings for the policy.

5 In **Actions**, view the action that will be taken when encrypted content is detected. To change those actions, click the **Edit** link.

> Primary and secondary filtering actions for encrypted content is the same as those of protected content. Refer to *Primary and secondary filtering actions for protected content on page 137*.

Signed content

Whenever information is transferred/uploaded electronically, it can accidentally or willfully be altered. To overcome this, some software use a digital signature - the electronic form of a handwritten signature.

A digital signature is extra information added to an email message that identifies and authenticates the information in that email. It is encrypted and acts like a unique summary of the information that is signed with a message digest in the email message.

If the email message contains a virus, bad content or is too large, the software might clean or remove some part of the message. The email is still valid, and can be read, but the original digital signature is 'broken'. You cannot rely on the contents of the email because the contents might also have been altered in other ways. Signed content policy specifies how email messages with digital signatures are handled.

1 From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.

2 Choose a desired policy.

3 Click **Signed Content**. The **View Settings** tab for the signed content filter appears.

4 In **Activation**, select or deselect **Enable** to enable or disable the signed content filter settings for the policy.

5 In **Actions**, view the action that will be taken when signed content is detected. To change those actions, click the **Edit** link.

> For more information on editing the actions that will be taken when a signed content is detected, refer to *Primary and secondary filtering actions for signed content on page 139*

Primary and secondary filtering actions for signed content

Primary actions for **On-Access** scan include:

- **Replace detected item with an alert** — to replace the detected item with an alert message.

- Delete embedded item — to delete the detected item. For example, to delete an attachment that triggers a detection rule.
- Allow changes to break the signature— to break the signature of the signed content which leads to the change of the content before being uploaded.
- Allow through — to allow the item to continue to the next scanning phase or on to its final destination.

Primary actions for On-Demand(Default), On-Demand (Find Banned Content), On-Demand (Remove Banned Content), and On-Demand(Full Scan) scan include:

- Replace detected item with an alert — to replace the detected item with an alert message.
- Delete message — to delete the email message item.
- Allow changes to break the signature— to break the signature of the signed content which leads to the change of the content before being uploaded.
- Allow through — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions for On-Access, On-Demand(Default), On-Demand (Find Banned Content), On-Demand (Remove Banned Content), and On-Demand(Full Scan) scan include:

- Log — to record the detection in a log.
- Quarantine — to take a copy of the item and store it in the quarantine database.
- Notify administrator — to send an alert message to the email administrator.
- Notify sender — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.
- Notify recipient — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

Password-protected files

Password-protected files cannot be scanned. For example, RAR or ZIP files. Password-protected files policy specifies how the email messages containing a password-protected content are handled when detected.

1 From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.

2 Choose a desired policy.

3 Click **Password-Protected Files**. The **View Settings** tab for the password-protected file filter appears.

4 In **Activation**, select or deselect **Enable** to enable or disable the password-protected file filter settings for the policy.

5 In **Actions**, view the action that will be taken when password-protected content is detected. To change those actions, click the **Edit** link.

> For more information on editing the actions that will be taken when a password-protected content is detected, refer to *Primary and secondary actions for password-protected content on page 141*.

Primary and secondary actions for password-protected content

Primary actions for **On-Access** scan include:

- **Replace item with an alert** — to replace the detected item with an alert message.
- **Delete message** — to delete the email message item.
- **Delete embedded item** — to delete the detected item. For example, to delete an attachment that triggers a detection rule.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Primary actions for **On-Demand(Default)**, **On-Demand (Find Banned Content)**, **On-Demand (Remove Banned Content)**, and **On-Demand(Full Scan)** scan include:

- **Replace item with an alert** — to replace the detected item with an alert message.
- **Delete message** — to delete the email message item.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions for **On-Access**, **On-Demand (Find Banned Content)**, **On-Demand (Remove Banned Content)**, and **On-Demand(Full Scan)** scan include:

- **Log** — to record the detection in a log.

- **Quarantine** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.

Secondary actions for **On-Demand(Default)** scan include:

- **Log** — to record the detection in a log.
- **Quarantine** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.
- **Notify sender** — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.
- **Notify recipient** — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

Scanner control

You can use **Scanner Control** settings to limit the nesting level, file size or scan time that is allowed when scanning email messages.

1. From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.
2. Choose a desired policy.
3. Click **Scanner Control**. The **View Settings** tab for scanner control appears.
4. In **Activation**, select or deselect **Enable** to enable or disable the password-protected file filter settings for the policy.
5. In **Options**, select the scanner control option set that you want to view or configure. You can select:
   - **Core Scanner Control Settings** — to view a summary of the scanner control option set that is used by default when no alternative scanner control option sets are available.
   - **create new set of options** — to create a new option set for this policy.

     > For step-by-step instructions, refer to *Creating new set of options for scanner control settings on page 143*.

   - **Edit** — to edit the selected option set.

6 In **Alert selection**, select an existing alert to use when a scanner control option is triggered, else **Create** a new alert.
If the alert text is not shown and you would like to preview it, click **View/Hide** to display the text. If the alert text is displayed, click **View/Hide** to hide it.

> For more information, refer to *Creating a new alert on page 120*.

7 In **Actions**, view/edit the actions that will be taken when the level of nesting, file size or scan time, is exceeded. To change those actions, click **Edit**.

> Fore more information, refer to *Editing primary and secondary scanner control actions on page 143*.

Creating new set of options for scanner control settings

1 From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.

2 Choose a desired policy.

3 Click **Scanner Control**. The **View Settings** tab for scanner control appears.

4 From the **Options** drop-down menu, choose **create new set of options**. The **Scanner Control** page appears.

5 Specify an **Instance name** for the scanner control settings. This field is mandatory.

6 In **Maximum nesting level**, specify the level to which the scanner should scan, when an attachment contains compressed files, and other compressed files within. We recommend that you limit scanning to a depth of 100.

7 In **Maximum expanded file size (MB)**, specify the maximum number of megabytes a file can be when expanded for scanning. We recommend a maximum size of 100 megabytes.

8 In **Maximum scan time (minutes)**, specify the maximum number of minutes that should be spent scanning any file. We recommend a maximum of 10 minutes.

9 Click **Save**, then **Apply**.

Editing primary and secondary scanner control actions

In **Scanner Control Actions**, you can specify the actions taken when:

- The maximum nesting level is exceeded.
- The maximum file size is exceeded.

- The maximum scanning time is exceeded.

Primary actions for On-Access scan include:

- Replace detected item with an alert — to replace a detected item, such as an attachment, with an alert message.
- Delete embedded item — to delete the detected item. For example, to delete an attachment that triggers a detection rule.
- Delete message — to delete the email message item.
- Allow through — to allow the item to continue to the next scanning phase or on to its final destination.

Primary actions for On-Demand (Default), On-Demand (Find Viruses), On-Demand (Remove Viruses), On-Demand (Find Banned Content), On-Demand (Remove Banned Content), On-Demand (Full Scan), and Gateway scan include:

- Replace detected item with an alert — to replace a detected item, such as an attachment, with an alert message.
- Delete message — to delete the email message item.
- Allow through — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions for On-Access and On-Demand (Default) scan include:

- Log — to record the detection in a log.
- Quarantine — to take a copy of the item and store it in the quarantine database.
- Notify administrator — to send an alert message to the email administrator.
- Notify sender — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.
- Notify recipient — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

Secondary actions for **On-Demand (Find Viruses)**, **On-Demand (Remove Viruses)**, **On-Demand (Find Banned Content)**, **On-Demand (Remove Banned Content)**, **On-Demand (Full Scan)**, and **Gateway** scan include:

- **Log** — to record the detection in a log.
- **Quarantine** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.

MIME mail settings

MIME Mail settings specify how MIME messages are handled.

MIME (Multipurpose Internet Mail Extensions) is a communications standard that enables the transfer of non-ASCII formats over protocols that supports only 7-bit ASCII characters.

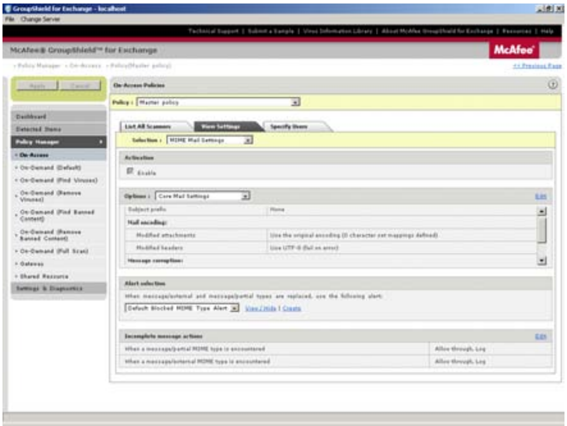
MIME mail settings are standard and may be modified only by advanced users.

1 From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.

2 Choose a desired policy.

3 Click **MIME Mail Settings**. The **View Settings** tab for the MIME mail settings appears.

Figure 10-2 MIME Mail Settings



Policy : Master policy

Selection : MIME Mail Settings

Activation

☑ Enable

Options : Core Mail Settings

Subject prefix	None
Mail encoding:	
Modified attachments	Use the original encoding (0 character set mappings defined)
Modified headers	Use UTF-8 (fail on error)
Message corruption:	

Alert selection

When message/external and message/partial types are replaced, use the following alert:

Default Blocked MIME Type Alert

Incomplete message actions

When a message/partial MIME type is encountered	Allow through, Log
When a message/external MIME type is encountered	Allow through, Log

GroupShield for Exchange - localhost
File Change Server
Technical Support | Submit a Sample | Virus Information Library | About McAfee GroupShield for Exchange | Resources | Help
McAfee® GroupShield™ for Exchange
McAfee
› Policy Manager › On-Access › Policy(Master policy)
<< Previous Page
Apply
Cancel
Dashboard
Detected Items
Policy Manager
On-Access
On-Demand (Default)
On-Demand (Find Viruses)
On-Demand (Remove Viruses)
On-Demand (Find Banned Content)
On-Demand (Remove Banned Content)
On-Demand (Full Scan)
Gateway
Shared Resource
Settings & Diagnostics
On-Access Policies
List All Scanners
View Settings
Specify Items
Edit
View / Hide | Create
Edit

4 In **Activation**, select or deselect **Enable** to enable or disable the MIME mail settings for the policy.

5 In **Options**, choose any one of these:

- **Core Mail Settings** — to view and configure the default mail size filter settings.
- An existing instance of MIME mail setting.
- **create new set of options** — to create a new set of MIME mail setting options for a selected policy.

> For more information, refer to *Creating new set of options for MIME mail settings on page 146*.

- **Edit** — to change the MIME mail setting options associated with a policy.

6 In **Alert selection**, choose the **Default Blocked MIME Type Alert** or an existing alert from the drop-down, else choose to **Create** a new alert.

> For more information, refer to *Creating a new alert on page 120*.

7 In **Incomplete message actions**, view/edit the actions taken when a partial MIME or external MIME type messages are detected. To change those actions, click **Edit**.

> For more information, see *Primary and secondary incomplete message actions on page 148*.

Creating new set of options for MIME mail settings

1 From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.

2 Choose a desired policy.

3 Click **MIME Mail Settings**. The **View Settings** tab for MIME mail settings appear.

4 From the **Options** drop-down menu, choose **create new set of options**. The **Mail Settings** page appears with four tabs: **Options**, **Advanced**, **MIME Types**, and **Character Sets**.

5 Specify an **Instance name** for MIME mail settings. This field is mandatory.

6 In the **Options** tab, type a **Prefix to message subject**.

7 In **Preferred re-encoding of attachments in a MIME message**, choose one of these re-encoding methods that is used when re-encoding attachments in MIME messages:

- **Re-encode using the original message encoding**

- **Re-encode using HTML with numeric unicode references**
- **Re-encode using the following character set** (in this case, choose a character set from the drop-down list).

8 In **Preferred re-encoding of modified subject headers**, choose one of these re-encoding methods that is used when re-encoding the subject headers in the MIME messages:

- **Re-encode using UTF-8**
- **Re-encode using the original encoding scheme**
- **Re-encode using the following character set** (in this case, choose a character set from the drop-down list).

9 Choose one of these options if the re-encoding of a subject header fails:

- **Treat as an error** - the MIME message is bounced.
- **Fallback to UTF-8** - the MIME message is encoded into UTF-8.

> ℹ You can perform step 9 only if you choose **Re-encode using the original encoding scheme** or **Re-encode using the following character set** from **Preferred re-encoding of modified subject headers**.

10 In **Advanced** tab, choose one of these encoding methods to use while encoding the text part of an email message:

- **Quoted-printable**, which is best suited for messages that mainly contain ASCII characters, but also contains some byte values outside that range.
- **Base64**, which has a fixed overhead and is best suited for non-text data, and for messages that do not have a lot of ASCII text.
- **8-Bit**, which is best suited for use with SMTP servers that support the 8BIT MIME transport SMTP extension.

11 Select or deselect **Do not encode if text is 7-bit** as required.

12 In **Default decode character set**, choose a character set that should be used for decoding when one is not specified by the MIME headers.

13 In **Maximum number of MIME parts**, specify the maximum number of MIME parts that can be contained in a MIME message. Default value is 10000 MIME parts.

14 In **Header corruption in a MIME message**, choose the desired option:

- **Treat as corrupt content and take appropriate action**

- Do not treat as corrupt content

15 In **NULL characters in the headers of a MIME message**, choose the desired option:

- Treat as corrupt content and take appropriate action
- Do not treat as corrupt content

16 In the **MIME Types** tab, specify which MIME types should be treated as text attachments and which, as binary attachments.

> ℹ Click **Add** to add the MIME types to the list or **Delete** to delete a MIME type from a list. Duplicate entries are not allowed.

17 In the **Character Sets** tab, choose a **Character set** and corresponding **Alternatives**. Deselect **Fixed** and click **Add** to specify an alternative character set mapping to the one specified in the MIME message.

> ℹ Click **Edit** to edit character mappings, **Delete** to delete character mappings and **Save** to save any changes you have made to the character mappings.
>
> The **Save** option is available only when you click **Edit**.

18 Click **Save**, then **Apply**.

Primary and secondary incomplete message actions

Primary actions for **On-Access**, **On-Demand (Default)**, **On-Demand (Find Viruses)**, **On-Demand (Remove Viruses)**, **On-Demand (Find Banned Content)**, **On-Demand (Remove Banned Content)**, **On-Demand (Full Scan)**, and **Gateway** scan include:

- **Allow through** - the MIME message is allowed to pass on to its final destination.
- **Delete message** - the MIME message is deleted.
- **Replace message with an alert** - the MIME message is replaced with an alert message.

The secondary actions for **On-Access** scan include:

- **Log** — to record the detection in a log.
- **Quarantine** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.
- **Notify sender** — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.

- **Notify recipient** — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

Secondary actions for **On-Demand (Default)** has two additional primary actions namely:

- **Notify internal sender** — to send an alert message to the internal sender, when the original email message originates in the same domain as Microsoft® Exchange Server 2003/2007.
- **Notify internal recipient** — to send an alert message to the internal recipient, when the recipient is in the same domain as Microsoft® Exchange Server 2003/2007.

Secondary actions for **On-Demand (Find Banned Content)**, **On-Demand (Remove Banned Content)**, **On-Demand (Full Scan)**, and **Gateway** scan include:

Log — to record the detection in a log.

Quarantine — to take a copy of the item and store it in the quarantine database.

Notify administrator — to send an alert message to the email administrator.

HTML files

1. From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.
2. Choose a desired policy.
3. Click **HTML Files**. The **View Settings** tab for HTML Files appear.
4. In **Activation**, select or deselect **Enable** to enable or disable the HTML File settings for the policy.
5. In **Options**, choose any one of these:
   - **Default HTML Settings** — to view and configure the default HTML File settings.
   - An existing instance of HTML File settings.
   - **create new set of options** — to create a new set of HTML File setting options for a selected policy.

For more information, refer to *Creating a new set of options for HTML file settings on page 150*.

- **Edit** — to change the HTML File setting options associated with a policy.

Creating a new set of options for HTML file settings

1. From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.
2. Choose a desired policy.
3. Click **HTML Files**. The **View Settings** tab for HTML File settings appear.
4. From the **Options** drop-down menu, choose **create new set of options**. The **HTML Files** page appears.
5. Specify an **Instance name** for HTML File settings. This field is mandatory.
6. In **Scan the following elements**, select any of these option(s):
   - **Comments** — to scan for comment elements in the HTML message.
     For example: `<!-- comment text --!>`
   - **Metadata** — to scan for metadata elements in the HTML message.
     For example: `< META EQUI="Expires" Content="Tue, 04 June 2007 21:29:02">`
   - **Links URLs ("<ahref=...")** — to scan for URL elements in the HTML message.
     For example: `<a HREF="McAfee.htm">`
   - **Source URLS ("<img src=...")** — to scan for source URL elements in the HTML message.
     For example:
     `<IMG SRC="..\..\images\icons\mcafee_logo_rotating75.gif">`
   - **JavaScript / VBScript** — to scan for JavaScript or Visual Basic script in the HTML message.
     For example: `<script language="javascript" scr="mfe/mfe.js">`
7. In **Remove the following executable elements**, select any of these option(s):
   - **JavaScript / VBScript** — to remove JavaScript or Visual Basic script elements from the HTML message.
     For example: `<script language="javascript" scr="mfe/mfe.js">`
   - **Java applets** — to remove Java applet elements from the HTML message.
     For example: `<APPLET code="XYZApp.class" codebase="HTML ....." ></APPLET>`

- **ActiveX controls** — to remove ActiveX control elements from the HTML message. For example: `<OBJECT ID="clock" data="http://www.mcafee.com/vscan.png" type="image/png"> VirusScan Image </OBJECT>`
- **Macromedia Flash** — to remove Macromedia Flash elements from the HTML message. This option gets enabled if you have selected ActiveX controls.
  For example: `<EMBED SCR="somefilename.swf" width="500" height="200">`

8 Click **Save**, then **Apply**.

Mail size filtering

1 From **Policy Manager**, select **Gateway**. The policy page for **Gateway** appears.

2 Choose a desired policy.

3 Click **Mail Size Filtering**. The **View Settings** tab for mail size filtering appears.

4 In **Activation**, select or deselect **Enable** to enable or disable the mail size filter settings for the policy.

5 In **Options**, choose any one of these:

- **Default Settings** — to view and configure the default mail size filter settings.
- An existing instance of mail size filter setting.
- **create new set of options** — to create a new set of mail size filter setting options for a selected policy.

> For more information, refer to *Creating new set of options for mail size filter on page 151*.

- **Edit** — to change the mail size filter setting options associated with a policy.

6 In **Actions**, view/edit the mail size filtering actions.

> For more information, see *Primary and secondary actions for mail size filtering on page 152*.

Creating new set of options for mail size filter

1 From **Policy Manager**, select **Gateway**. The policy page for **Gateway** appears.

2 Choose a desired policy.

3 Click **Mail Size Filtering**. The **View Settings** tab for mail size filtering appears.

4 From the **Options** drop-down menu, click **create new set of options**. The **Mail Size Filtering** page appears.

5 Specify an **Instance name** for the mail size filter settings. This field is mandatory.

6 In **Maximum overall mail size (KB)**, specify the maximum size (in kilobytes) that an email message can be. We recommend 100,000 kilobytes (100 megabytes).

7 In **Maximum attachment size (KB)**, specify the maximum size (in kilobytes) that an email message attachment can be. We recommend 32000 kilobytes.

8 In **Maximum number of attachments**, specify the maximum number of attachments an email message can have. We recommend a maximum of 500 attachments.

9 Click **Save**, then **Apply**.

ℹ Mail size filtering is applicable to both inbound and outbound email messages.

Primary and secondary actions for mail size filtering

Primary actions in the **Message Size** tab include:

- **Replace all attachments with a single alert** — to create a single alert for all attachments and replace them instead of generating an alert for each attachment within an email message.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Primary actions in the **Attachment Size** tab include:

- **Replace the attachment with an alert** — to replace the attachment with an alert. In this case, an alert is generated for each attachment that triggers a detection.
- **Remove the attachment** — to remove the attachment from the email message.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Primary actions in the **Attachment Count** tab include:

- **Replace all attachments with a single alert** — to create a single alert for all attachments and replace them instead of generating an alert for each attachment within an email message.
- **Remove all attachments** — to remove all of the attachments from the email message.
- **Allow through** — to allow the item to continue to the next scanning phase or on to its final destination.

Secondary actions are the same for all tabs.

- **Log** — to record the detection in a log.
- **Quarantine** — to take a copy of the item and store it in the quarantine database.
- **Notify administrator** — to send an alert message to the email administrator.
- **Notify sender** — to send an alert message to the sender, when the original email message does not originate in the same domain as Microsoft® Exchange Server 2003/2007.
- **Notify recipient** — to send an alert message to the recipient, when the recipient is not in the same domain as Microsoft® Exchange Server 2003/2007.

Miscellaneous

Miscellaneous settings include:

- Alert Settings
- Disclaimer Text

Alert settings

Alert messages are used to notify a person when a particular event occurs. You can use **Alert Settings** to set up additional information about these alerts.

1 From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.

2 Choose a desired policy.

3 Click **Alert Settings**. The **View Settings** tab for alert settings appear.

4 In **Activation**, select or deselect **Enable** to enable or disable the alert settings for the policy.

5 In **Options**, choose any one of these:

- **Default Alert Settings** — to view and configure the default alert settings.
- An existing alert.
- **create new set of options** — to create a new set of alert setting options for a selected policy.

For more information, refer to *Creating new set of options for alert settings on page 154*.

- **Edit** — to change the alert setting options associated with a policy.

Creating new set of options for alert settings

1 From **Policy Manager**, select a submenu item. The policy page for the submenu item appears.

2 Choose a desired policy.

3 Click **Alert Settings**. The **View Settings** tab for alert settings appears.

4 From the **Options** drop-down menu, click **create new set of options**. The **Alert Settings** page appears.

5 Specify an **Instance name** for alert setting. This field is mandatory.

6 Choose **HTML** or **Plain text** as the **Alert format**.

7 From the **Character encoding** drop-down menu, choose a desired character set.

8 In **Alert filename**, specify the file name for this alert, including the appropriate HTML (.htm) or plain text (.txt) file extension.

9 Select or deselect **Enable alert headers** to enable the use of an alert header.

10 In the **Alert header** text entry box, enter the header for the alert.

11 From **Show**, choose **HTML content (WYSIWYG)** or **HTML content (source)** depending on whether the HTML text should be shown as compiled code or source code in the **Alert header**.

> The **Show** option is only available if you have selected **HTML** as the alert message format.

12 Select or deselect **Enable alert footers** to enable the use of an alert footer.

13 In the **Alert footer** text entry box, enter the footer for the alert.

14 From **Show**, choose **HTML content (WYSIWYG)** or **HTML content (source)** depending on whether the HTML text should be shown as compiled code or source code in the **Alert footer**.

> The **Show** option is only available if you have selected **HTML** as the alert message format.

15 Click **Save**, then **Apply**.

Disclaimer text

1 From **Policy Manager**, select **Gateway**. The policy page for **Gateway** appears.

2 Choose a desired policy.

3 Click **Disclaimer Text**. The **View Settings** tab for the disclaimer text settings appear.

4 In **Activation**, select or deselect **Enable** to enable or disable the disclaimer text settings for the policy.

5 In **Options**, choose any one of these:

- **Default Settings** — to view and configure the default disclaimer text settings.
- An existing disclaimer text.
- **create new set of options** — to create a new set of disclaimer text setting options for a selected policy.

For more information, refer to *Creating new set of options for disclaimer text on page 155*.

- **Edit** — to change the disclaimer text setting options associated with a policy.

Creating new set of options for disclaimer text

1 From **Policy Manager**, select **Gateway**. The policy page for **Gateway** appears.

2 Choose a desired policy.

3 Click **Disclaimer Text**. The **View Settings** tab for disclaimer text appears.

4 From the **Options** drop-down menu, click **create new set of options**. The **Disclaimer Text** page appears.

5 Specify an **Instance name** for the disclaimer text. This field is mandatory.

6 In **Disclaimer message (plain text only)**, type the disclaimer text message in plain text format.

7 From the **Insert disclaimer** drop-down menu, choose **Before any message text**, **After any message text** or **As an attachment** depending on where/how the disclaimer text should be inserted in the email message.

8 Click **Save**, then **Apply**.

Disclaimers are applicable only to outbound email messages.

Shared resource

When setting up policies, you might want the same resource to be used by more than one policy. For example, you might want to use the same disclaimer text in two policies. The disclaimer text can be thought of as a resource that can be shared by more than one policy. Instead of creating two disclaimer texts, you can create a single copyright message that can be used by both policies.

You can use Shared Resource to:

- View shared resource settings.
- Create new resources.
- Change the resource settings, so that the changes are picked up by all policies using the shared resources.
- Delete shared resources that are no longer in use.

> Some resources cannot be deleted.

Shared Resources page has three tabs namely:

- Scanners & Alerts
- Filter Rules
- Time Slots

Scanners and alerts

In **Scanners**, you can configure the scanner-related settings that a policy can apply when scanning the items. You can use:

- **Category** — to select the type of settings you want to configure. The options are:
  - Anti-Virus Scanner
  - Anti-Spam
  - Anti-Phishing
  - MIME Mail Settings
  - Scanner Control
  - Alert Settings
  - Disclaimer Text

  - HTML Files
  - Mail Size Filtering.
- **Create New** — to create a new shared resource for a selected category.

> For detailed information, refer to *Creating a new shared resource for anti-virus scanner*, *Creating a new shared resource for anti-spam*, *Creating a new shared resource for scanner control*, and *Creating a new shared resource for alert settings*

- **Delete** — to delete a resource that is no longer used by any of the policies. Some resources cannot be deleted.
- **Edit** — to change the resource settings.

In **Alerts**, you can use:

- **Category** — to select the type of alert message you want to configure.
- **Create New** — to create an alert message. The default alert message text is displayed, and you edit it to create the new alert message.

> For more information, refer to *Creating a new alert on page 120*

- **Delete** — to delete an alert message that is no longer used by any of the policies.
- **Edit** — to change the alert message.
- **Rename** — to rename the alert category.
- **View** — to view an alert message.

> You can view only the default alert message for each type of alert. Default alert messages cannot be edited or deleted.

Creating a new shared resource for anti-virus scanner

1. In **Policy Manager**, click **Shared Resource**. The **Shared Resources** page appears.
2. In **Scanners & Alerts** tab, choose **Anti-Virus Scanner** from the **Category** drop-down menu.
3. In the **Scanners** pane, click **Create New**. The **Anti-Virus Scanner Settings** page appears.
4. Perform step 5 - 12 of *Creating new set of options for Anti-Virus Scanner on page 115*.
5. In the **Alerts** pane, choose a **Category**.
6. Click **Create New** and perform steps of *Creating a new alert on page 120*.

Creating a new shared resource for anti-spam

1. In **Policy Manager**, click **Shared Resource**. The **Shared Resources** page appears.
2. In **Scanners & Alerts** tab, choose **Anti-Spam** from the **Category** drop-down menu.
3. In the **Scanners** pane, click **Create New**. The **Anti-Spam Settings** page appears.
4. Perform step 6 -16 of *Creating new set of options for anti-spam settings on page 129*.
5. In the **Alerts** pane, choose a **Category**.
6. Click **Create New** and perform steps of *Creating a new alert on page 120*.

Creating a new shared resource for anti-phish

1. In **Policy Manager**, click **Shared Resource**. The **Shared Resources** page appears.
2. In **Scanners & Alerts** tab, choose **Anti-Phishing** from the **Category** drop-down menu.
3. In the **Scanners** pane, click **Create New**. The **Anti-Phishing Settings** page appears.
4. Perform step 5 -7 of *Creating new set of options for anti-phishing settings on page 133*.
5. In the **Alerts** pane, choose a **Category**.
6. Click **Create New** and perform steps of *Creating a new alert on page 120*.

Creating a new shared resource for MIME mail settings

1. In **Policy Manager**, click **Shared Resource**. The **Shared Resources** page appears.
2. In **Scanners & Alerts** tab, choose **MIME Mail Settings** from the **Category** drop-down menu.
3. In the **Scanners** pane, click **Create New**. The **Mail Settings** page appears with four tabs: **Options**, **Advanced**, **MIME Types**, and **Character Sets**.
4. Perform step 5 - 18 of *Creating new set of options for MIME mail settings on page 146*.
5. In the **Alerts** pane, choose a **Category**.
6. Click **Create New** and perform steps of *Creating a new alert on page 120*.

Creating a new shared resource for scanner control

1. In **Policy Manager**, click **Shared Resource**. The **Shared Resources** page appears.
2. In **Scanners & Alerts** tab, choose **Scanner Control** from the **Category** drop-down menu.
3. In the **Scanners** pane, click **Create New**. The **Scanner Control page** appears.

4 Enter the **Instance name**.

5 Enter the **Maximum nesting level**.

6 Enter the **Maximum expanded file size** (MB).

7 Enter the **Maximum scan time (minutes)**.

8 Click **Save**.

9 In the **Alerts** pane, choose a **Category**.

10 Click **Create New** and perform steps of *Creating a new alert on page 120*.

Creating a new shared resource for alert settings

1 In **Policy Manager**, click on **Shared Resource**. The **Shared Resources** page appears.

2 In **Scanners & Alerts** tab, choose **Alert Settings** from the **Category** drop-down menu.

3 In the **Scanners** pane, click **Create New**. The **Alert Settings** page appears.

4 Perform step 5 - 15 of *Creating new set of options for alert settings on page 154*.

5 In the **Alerts** pane, choose a **Category**.

6 Click **Create New** and perform steps of *Creating a new alert on page 120*.

Creating a new shared resource for disclaimer text

1 In **Policy Manager**, click on **Shared Resource**. The **Shared Resources** page appears.

2 In **Scanners & Alerts** tab, choose **Disclaimer Text** from the **Category** drop-down menu.

3 In the **Scanners** pane, click **Create New**. The **Disclaimer Text** page appears.

4 Perform step 5 - 8 of *Creating new set of options for disclaimer text on page 155*.

5 In the **Alerts** pane, choose a **Category**.

6 Click **Create New** and perform steps of *Creating a new alert on page 120*.

Creating a new shared resource for HTML files

1 In **Policy Manager**, click on **Shared Resource**. The **Shared Resources** page appears.

2 In **Scanners & Alerts** tab, choose **HTML Files** from the **Category** drop-down menu.

3 In the **Scanners** pane, click **Create New**. The **HTML Files** page appears.

4 Perform step 5 - 8 of *Creating a new set of options for HTML file settings on page 150*.

5 In the **Alerts** pane, choose a **Category**.

6 Click **Create New** and perform steps of *Creating a new alert on page 120*.

Creating a new shared resource for mail size filtering

1 In **Policy Manager**, click on **Shared Resource**. The **Shared Resources** page appears.

2 In **Scanners & Alerts** tab, choose **Mail Size Filtering** from the **Category** drop-down menu.

3 In the **Scanners** pane, click **Create New**. The **Mail Size Filtering** page appears.

4 Perform step 5 - 8 of *Creating new set of options for mail size filter on page 151*.

5 In the **Alerts** pane, choose a **Category**.

6 Click **Create New** and perform steps of *Creating a new alert on page 120*.

Filter rules

In **Content Scanner Rules**, you can configure the rules that a policy can apply to the content of mails, and text in attachments. You can use:

- **Category** — to select the type of rules you want to configure.
- **New Category** — to create a new category of rules.
- **Rename** — to rename a category.
- **Delete** — to delete a category that you no longer require.
- **Create New** — to create a new rule.

> For more information, refer to *Creating a new content scanner rule on page 161*

- **Edit** — to change the rule settings.
- **Delete** — to delete a rule that is no longer used by any of the policies.

> There are two **Delete** links. One link is to delete a category present in the drop-down list and the other one is to delete a rule that you have created.

You should give each new rule a unique and meaningful name. Avoid using names and descriptions that might be offensive, because the they can be included in notifications sent to users when a rule is triggered. Additionally, you do not want notifications to be blocked because they contain banned content.

In **File Filtering Rules**, you can set up rules that apply to file name, file type, and file size. You can use:

- **Create New** — to create a new file filtering rule.

> For more information, refer to *Creating new file filtering rule on page 162*

- **Delete** — to delete a rule that is no longer used by any of the policies.
- **Edit** — to change the rule settings.

> When configuring policies, you can select which file filtering rules should be used, and the order in which they are applied when scanning files.

Creating a new content scanner rule

1. In **Policy Manager**, click on **Shared Resource**. The **Shared Resources** page appears.
2. Click **Filter Rules** tab.
3. In **Content Scanner Rules** pane, click **Create New**. The **New Content Scanner Rule** page appears.
4. Enter a unique **Rule Name**.
5. Under **Details**, enter a brief description for the rule in the **Description** field.
6. Under the **Word or Phrase** tab, specify the words or phrases to look for, in **The rule will trigger when the following word or phrase is found**.
7. Select the desired option(s):
   - **Ignore case** — If enabled, the rule is triggered for specified word or phrase of any case.
   - **Starts a longer word or phrase** — If enabled, the rule is triggered for specified text that begins with the word or phrase.
   - **Use Wildcards** — If enabled, the rule is triggered for the specified word or phrase that contain wildcard character(s). (Wildcard characters are often used in place of one or more characters when you do not know what the real character is or you do not want to type the entire name).
   - **Ends a longer word or phrase** — If enabled, the rule is triggered for specified text that forms the last part of the word or phrase.

8 Under the **File Format** tab, select **Everything** to select all the file categories and its subcategories.
You can select multiple categories and file types within the selected categories to be matched. Selecting **All** in the subcategory selector overrides any other selections that may already have been made.

9 Click **Save**, then **Apply**.

Creating new file filtering rule

1 In **Policy Manager**, click on **Shared Resource**. The **Shared Resources** page appears.

2 Click **Filter Rules** tab.

3 In **File Filtering Rules** pane, click **Create New**. The **File Filtering Rule** page appears.

4 Follow the instructions of *Creating a new file filtering rule on page 125*.

Time slots

In **Time Slots**, you can set up different time slots that can be applied to policies. You can use:

- **View** — to view the time slot of **All the time**.
- **Delete** — to delete a time slot that is not used by any of the policies.
- **Edit** — to change the name or times associated with a specific time slot.
- **Create New** — to create a new time slot.

Creating a new time slot

1 In **Policy Manager**, click on **Shared Resource**. The **Shared Resources** page appears.

2 Click **Time Slots** tab.

3 Click **Create New**. The **Time Slot** page appears.

4 Enter a unique **Time slot name**.

5 Under **Select day and time**, choose the desired day(s).

6 Choose **All day** or **Selected hours** one wants to put into the created time slot.
If you choose **Selected hours**, choose the **Start** and **End** time from the drop-down.

7 Click **Save**, then **Apply**.

Master policies use the **All the time** time slot. If you want a policy to be active during a different time slot, you must create a subpolicy and specify a different time slot.

11 Settings & Diagnostics

This chapter describes the settings and diagnostics you could perform on GroupShield for Exchange.

Topics covered are:

- *On-Access Settings*
- *Notifications*
- *Anti Spam*
- *Detected Items*
- *User Interface Preferences*
- *Diagnostics*
- *Product Log*
- *DAT Settings*
- *Import and Export Configuration*

On-access settings

On-Access Settings is used to configure the **General** settings, **Microsoft Virus Scanning API (VSAPI)** settings, and **Transport Scan Settings**.

For Exchange Server 2003

By default, the McAfee® Transport Scanner is enabled and scans all the email messages. If you deselect **Transport Scan Settings**, Microsoft® Virus Scanning API (VSAPI v 2.5) scans the email messages.

1 Click **Settings & Diagnostics** | **On-Access Settings.** The **On-Access Settings** page appears.

2 In **General**, choose **Allow Through** or **Remove** depending on whether you want to allow the email message through or delete it, if scanning fails.

3 In **Microsoft Virus Scanning API (VSAPI)**:

- Select or deselect **Enabled** to specify whether VSAPI should be enabled or not.

> VSAPI is implemented at a very low-level in the Exchange Information Store. This allows a virus scanning application to run with high performance, and guarantees that the message will be scanned before any client can access the message or its attachment. This allows messages and attachments to be scanned once before delivery, rather than multiple times (depending on the number of mailboxes to which the message is delivered). This single-instance scanning also helps prevent messages from being re-scanned when a message is copied, which results in improved system performance.

- Select or deselect **Proactive Scanning** to specify whether or not to scan email messages and files when they are written to the store.

> Proactive scanning is a type of scanning that is made possible by Microsoft® VSAPI. It enables objects from the store to be scanned in order of priority.
>
> Items passing in and out of the store receive a priority rating and are placed in a scanning queue. The scanning queue allows prioritization and re-prioritization of items in the queue.
>
> For example, if a user tries to open an item that has not been scanned, it is assigned a high priority, whereas items being saved or posted to public folders are assigned a low priority. This is known as priority based queuing.
>
> When all the high priority items have been scanned, scanning of lower priority items begins. The latter scans on a first-in-first-out (FIFO) basis.

- Select or deselect **Background Scanning** to specify whether background scanning should be enabled or not.
  You can use **Enable At** and **Disable At** to schedule the background scanning.

> Background scanning is a type of on-access scanning made possible within Microsoft® Exchange 2003/2007 by Microsoft® VSAPI, which does not scan all files on access, reducing the scanner's workload. It scans the databases on which it has been enabled. Background scanning is off by default.

- Type **Scan Timeout (seconds)** to specify a time to wait for a scan to wait before it gets timed out.

- Check the **Default** option to use the default **Number of Scan Threads**, else deselect the option and enter a desired value. We recommend you to use the **Default** option.

4 In **Transport Scan Settings**:

- Select **Enabled** to benefit from direction-based SMTP scanning control. If deselected, the remaining options also becomes inactive.
- Select **Scan Inbound Mails** to scan messages coming from an external server (for example, Internet-based email messages). If this option is selected and the next two options are deselected, then a mail going to a different domain is not scanned.
- Select **Scan Outbound Mails** to scan any email message that leaves your Exchange Server or Exchange organization.
  Messages are designated as outbound if at least one recipient has an external address.
- Select **Scan Internal Mails** to scan email messages that are being routed from one location inside your domain to another location inside your domain.
  Messages are designated as Internal if they originate from inside your domain and ALL the recipients are located inside your domain.

Transport scanning allows you to scan SMTP traffic before it enters the Exchange information store. SMTP Transport scanning can perform scanning of routed email messages that are not destined for the local server and can stop delivery of messages. SMTP Transport scanning can be applied to Microsoft® Exchange 2003 with the VSAPI 2.5.

5 Click **Apply**.

For Exchange Server 2007

Background scanning capabilities in GSE 7.0 are enhanced using the new features available in VSAPI v 2.6.

Also, there is a stamping mechanism in case of GroupShield for Exchange Server 2007. After an email message is scanned, the McAfee® Transport Scanner assigns a stamp to the header of the email message. This prevents the email message from being re-scanned by Microsoft® Virus Scanning API (VSAPI).

The remaining features remain the same as that of Exchange Server 2003.

1 Click **Settings & Diagnostics | On-Access Settings.** The **On-Access Settings** page appears.

2 Under **Background Scan Settings**, select or deselect **Enable** to specify whether background scanning should be enabled or not.
You can use **Enable At** and **Disable At** to schedule the background scanning.

3 Select **Only Messages With Attachment** to enable background scanning for only email messages that has attachments.

4 Select **Only Un-Scanned Items** to enable background scanning only to those messages that have not been scanned yet.

5 Select **Force Scan All** to scan items irrespective of whether the item has a scan stamp or not.
If an item has a scan stamp, it means that the item is scanned and up to date.

6 Select **Update Scan Stamp** to perform background scanning up to date.
When you deselect this option, do not update stamp. This feature is useful e.g. if the vendor wants to access the messages but not necessarily virus scan them.

7 Choose the **From Date** and **To Date** fields to schedule the scan stamp update.
You also have an option to select **Till Date** if required.

8 In **Transport Scan Settings**:

- Select **Enable** to enable transport scanning. If deselected, the remaining options also becomes inactive.
- **Transport Scan Stamp** - select to benefit direction-based SMTP scanning control.
- **Scan Inbound Mails** - select to scan messages coming from an external server (for example, Internet-based email messages). If this option is selected and the next two options are deselected, then a mail going to a different domain is not scanned.
- **Scan Outbound Mails** - select to scan any email message that leaves your Exchange Server or Exchange organization.
  Messages are designated as outbound if at least one recipient has an external address.
- **Scan Internal Mails** - select to scan email messages that are being routed from one location inside your domain to another location inside your domain.
  Messages are designated as Internal if they originate from inside your domain and ALL the recipients are located inside your domain.

Under **Microsoft Virus Scanning API (VSAPI)**, enter the **Lower Age Limit (seconds)** to specify whether to scan all emails or only those that are not older than the date/time mentioned in the setting.
This is useful in a scenario where the customer suspects an outbreak/infection of emails that came only in the last 2 days.
This will also help in finishing the background scanning faster and hence result in lesser load on the server.

9 Click **Apply**.

Notifications

Notification settings allows the user to configure the content and SMTP address for the administrator to send email notifications.

1 Click **Settings & Diagnostics | Notifications**. The **Notifications** page appears.

2 Type the **Administrator E-mail** address to notify the administrator email account of that Exchange Server.

3 Type the **Sender E-mail** to notify using the sender email address.

4 Type a **Subject line for notification** to notify using the contents in the subject line, when a notification is sent.

5 In **Notification Text**, click **Edit** to change the notification text that should be included in the body of the message.

You can use more *notification fields* and have a custom notification.

6 Select **Enable Task results notification** to send emails with on-demand scan and update tasks results. The email is in HTML format and has the same data and format as **Task Result** window in the UI. This feature can be enabled/disabled through this option. By default, this feature is disabled.

7 Click **Apply**.

Notification fields to use:

- %dts% — Date and Time
- %sdr% — Sender
- %ftr% — Filter
- %fln% — Filename
- %rul% — RuleName
- %act% — Action Taken
- %fdr% — Folder
- %vrs% — Detection Name
- %trs% — State (Train State)
- %tik% — Ticket Number

- %idy% — Scanned By
- %psn% — Policy Name
- %svr% — Server
- %avd% — AV DAT
- %ave% — AV Engine
- %rpt% — Recipient
- %rsn% — Reason
- %sbj% — Subject
- %ssc% — Spam score
- %ase% — Anti-Spam Engine
- %asr% — Anti-Spam Rules

Anti spam

You can use **Anti Spam** settings to configure **Gateway Spam Filter** and **User Junk Folder Routing**.

1. Click **Settings & Diagnostics | Anti Spam**. The **Anti Spam Settings** page appears.
2. Type an email address to configure the **System Junk Folder Address** to filter the junk mails.
3. Select **Enable routing to the user junk folders on this server** to route junk mails to the user junk folders on the mail server.
4. Click **Apply**.

Detected items

You can use **Detected Items** to:

- Specify whether local database or the McAfee Quarantine Manager should be used for quarantining email messages.

- Configure the settings used when communicating with McAfee Quarantine Manager.
- Configure maintenance settings for the local quarantine database.

McAfee Quarantine Manager

1. Click **Settings & Diagnostics | Detected Items**. The **Detected Items** page appears.
2. Select **Enabled** to use McAfee Quarantine Manager as a repository to quarantine detected items.
   If deselected, the remaining options are also disabled.
3. Type the **IP address** of the McAfee Quarantine Manager server.
4. Specify the McAfee Quarantine Manager **Port** number that GroupShield for Exchange will use when sending spam detection and other information to the McAfee Quarantine Manager. The default port number is 49500.
5. In **Callback port**, specify the GroupShield for Exchange port number that McAfee Quarantine Manager will use when releasing email messages or sending configuration information to GroupShield for Exchange.
6. Click **Apply**.

For more information on using McAfee Quarantine Manager, please see the *McAfee Quarantine Manager v 4.1 Product Guide*.

Local database

1. Select **Specify location of database**, choose the type of **Database location** in the first field (from the drop-down), and specify a location in the second field accordingly.
2. In **Maximum item size (MB)**, specify the maximum size, any item to be stored in the database can be.
3. In **Maximum query size (records)**, specify the maximum number of records that can be returned when the local quarantine database receives a query.
4. In **Maximum item age (days)**, specify the maximum number of days an item will be held in the local quarantine database before being marked for deletion.
5. Click **Edit Schedule** of **Purge of old items frequency** to specify how frequently old items that are marked for deletion are removed from the database.
6. Click **Edit Schedule** of **Optimization frequency** to specify how frequently the database is optimized.

7 Click **Apply**.

User interface preferences

You can use **User Interface Preferences** to configure user interface refresh, report, metric, graph and chart settings.

Dashboard settings

1 Click **Settings & Diagnostics** | **User Interface Preferences**. The **User Interface Preferences** page appears.

2 In the **Dashboard Settings** tab, select **Automatic refresh** to specify whether the information shown on the Dashboard should be refreshed automatically.

3 In **Refresh rate (seconds)**, type the duration in seconds so that the information on the dashboard is refreshed after the specified time.

4 Select **Enable reports** to enable or disable reporting.

5 Select **Show recently scanned items** to specify whether the recently scanned items should be included in the reports.

6 In **Maximum recently scanned items**, specify the maximum number of recently scanned items that should be included in the reports.

7 In **Graph scale (units)**, type the measurement units for the scale of the graph that is generated.

8 In **Number of hours to report for**, type the report generation interval (in hours) to generate a report.

9 Click **Apply**.

Graph and chart settings

1 In the **Graph and Chart Settings** tab, select **3D** to specify whether you want the Dashboard graph to be displayed as a three-dimensional (3D) graph.

2 Select **Draw transparent** to specify whether the bars in a three-dimensional bar graph should appear solid or transparent. A solid bar will hide part of any bar behind it. A transparent bar allows you to look through it and see other transparent bars behind it.

3 Select **Anti-alias** to specify whether you want to use anti-aliasing techniques when displaying pie charts. If anti-aliasing is used, you will see smoother curves in pie charts. If anti-aliasing is not used, pie chart curves appear more jagged.

4 Select **Explode pie** to specify whether the segments should remain within the circle of the pie chart or be shown with some distance between each segment.

5 In **Pie angle (degrees)**, specify the angle to use when drawing pie charts.

6 Click **Apply**.

Diagnostics

You can use **Diagnostics** to specify the level of debug logging required, the maximum size of debug files, and where they should be saved. You can configure the error reporting service settings and specify which events should be captured in the product log and event log by specifying the product log's location, name, size limits, and time-out settings.

Debug logging

1 Click **Settings & Diagnostics** | **Diagnostics**. The **Diagnostics** page appears.

2 In the **Debug Logging** tab, from the **Level** drop-down menu, specify the type of information that should be captured in the debug log. You can select:

- **High** — to collect large number of log entries.
- **Medium** — to collect medium number of log entries.
- **Low** — to collect low number of log entries.
- **None** — to disable debug logging.

3 Select **Limit size of debug log files** to specify if you want a size limit for debug log files. In **Maximum size of debug log file**, specify how large (in megabytes or kilobytes) the debug log files can be.

4 Select **Specify location for debug files** to specify a location for debug files. Choose any location from the drop-down and specify the location accordingly:

- (Full Path)
- <Desktop>\
- <Install Folder>\

- <System Drive>\
- <Program Files>\
- <Windows Folder>\

Avoid using debug logging indiscriminately because it fills up the hard disk space and affects the overall performance of the Exchange Server. It should be enabled for a limited duration as advised by an authorized personnel (McAfee support engineer).

Error reporting service

1. In the **Error Reporting Service** tab, select **Enable** to enable or disable the error reporting service.
2. Select **Catch exceptions** to capture information about exceptional events, such as system crashes.
3. Select **Report exceptions to user** to specify whether exceptions should be reported to the administrator.

Event logging

1. In the **Event Logging** tab, under **Product Log**, select **Write information events**, **Write warning events**, and **Write error events** to include these events into the product log.
2. Under **Event Log**, select **Write information events**, **Write warning events**, and **Write error events** to include these events into the event log.

Product log

In the **Product Log** tab, you can specify the location, size limit and the query time-out settings for a product log.

1. In **Locations** section, select **Specify location of database** to specify whether you want to use the default location for the product log or specify a different location.
   If deselected, the default location is used. If selected, choose any location from the drop-down and specify the location accordingly:
   - (Full Path)
   - <Desktop>\
   - <Install Folder>\
   - <System Drive>\
   - <Program Files>\

- <Windows Folder>\

2 Select **Specify filename of database** to specify whether you want to use the default file name or specify a different name. If deselected, the default file name is used. The default **Database filename** is **productlog.bin**.

3 In **Size Limits** section:

- Select **Limit database size** to specify that you want to limit the size of the product log database.
- Enter the **Maximum database size** that the product log database can be. You can specify the size in either megabytes or kilobytes.
- Select **Limit age of entries** to specify a set period of time after which you want the product log entries to be deleted.
- Enter the **Maximum age of entry** to specify how many days an entry should remain in the database before it is deleted.

4 In **Advanced** section:

- Select **Specify a query timeout** to limit the amount of time allowed for answering a product log query.
- Enter the **Query timeout (seconds)** to specify the maximum number of seconds allowed when answering a product log query.

5 Click **Apply**.

Product log

You can use **Product Log** to set up search filters that help you find information in the product log and view the results of the search.

To search for detections:

1 Click **Settings & Diagnostics** | **Product Log**. The **Product Log** page appears.

2 From the **Product Log** section, select at least one of these filters:

- **ID** — Enter the number which identifies a specific product log entry.
- **Level** — Select **Information**, **Warning** or **Error** from the drop-down in the second field depending on the type of log you want to see.

- **Description** — Select the relevant description.

> You can select up to three search filters.

3. Choose the **All Dates** radio button to include all entries, else choose **Date Range** and choose the desired date range from the drop-down menu.
4. Click **Search**. A list of detected items matching your search criteria, are displayed in the **View Results** section.

> Click **Clear Filter** to return to the default search filter settings and **Export to CSV File** to export the list of detections in .CSV format.

5. Click **Apply**.

DAT settings

DAT files are the detection definition files, also referred to as signature files, that identify the code anti-virus and/or anti-spyware software detects to repair viruses, trojan horses and Potentially Unwanted Programs (PUPs).

1. Click **Settings & Diagnostics | DAT Settings**. The **DAT Settings** page appears.
2. Specify **Maximum number of old DATs** to specify the maximum number of DAT generations that shall be preserved in the system during regular updates. Default value is 10.
3. Click **Apply**.

Import and export configuration

You can use **Import and Export Configurations** to:

- Copy the configuration of the Exchange Server to an area where it can be imported by the other Exchange Server.
- Apply the configuration of a different Exchange system to this system.
- Specify the location from which automatic updates are downloaded. Location information is stored in a site list, and you can specify which site list to use.

There are two tabs, **Configuration** and **Site List**.

Configuration

You can copy the configuration of this Exchange Server system and save it to a location where it can be imported by other Exchange Server systems. To do so:

1. Click **Settings & Diagnostics | Import and Export Configuration**. The **Import and Export Configurations** page appears.
2. Select the **Configuration** tab.
3. Click **Export**.
4. Specify the location where the file will be stored.
5. Click **Save**, then **Apply**.

Importing a different configuration for this Exchange Server system:

1. Click **Settings & Diagnostics | Import and Export Configuration**. The **Import and Export Configurations** page appears.
2. Select the **Configuration** tab.
3. Use the **Filename** field or **Browse** to locate the configuration file you want to import.
4. Click **Import** to import that configuration.

> Click **Restore Default** to restore the default settings and values from the McAfeeConfig.xml file.

Site list

A site list specifies from where automatic updates are downloaded.

By default, GroupShield uses a site list that points to a McAfee site for automatic updates, but you can use a site list that points to a different location.

If you have already created an alternative site list that you want to import:

1. In the **Site List** tab, use the **Filename** field or **Browse** to locate the **Sitelist.xml** file you want to use.

> **Sitelist.xml** is obtained by exporting a repository list from the ePolicy Orchestrator Server or the McAfee AutoUpdate Architect Server.

2. Click **Import**. The new site list will overwrite the existing/default site list.

3. Click Apply.

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